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- *New Subscribers* - All new clients to receive prior year's *Market Analysis Report* with subscription.

- All other reports available to new subscribers at wholesale prices.

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2. Report Pricing

CODE	Component	Wholesale ($)	Retail ($)
1992 REPORTS			
SEIN2	Imapct of Downsizing on SI	2,000	3,000
SEIC2	SI Opportunities inRe-engineering	2,000	3,000
SEIV2	Methods for Successful SI Projects	2,000	3,000
SEIM1	Systems Integration Market, 1992-1997	3,500	5,500
SEVR2	SI Vendor Analysis	3,500	5,500
SESIP	Research Bulletins	NC	NA
1991 REPORTS			
SEIM1	Systems Integration Market Analysis	1,500	3,000
SEIV1	SI Vendor Issues	1,500	3,000
SEIC1	W.E. SI User Issues	1,500	3,000
SEIS1	Imaging Opportunities—W.E. SI	1,500	3,000

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Network Management Services Program—Europe Pricing

1. Full NENSP Program - $31,000 (Based on $2.00 per Pound Sterling)

Component	Wholesale ($)	Retail ($)
Network Services Market	5,000	6,000
Network Services Competitive analysis	5,000	6,000
Major corporate Network Management Requirements	5,000	6,000
Network Services Customer Satisfaction	5,000	6,000
End User Network Services	5,000	6,000
Research Bulletins	NC	NA
Hotline	2,000	6,000
Client Meetings	NC	NA
Annual Presentation	2,000	3,000
TOTAL	29,000	39,000

PROGRAM PRICING

- Minimum NENSP subscription to qualify for Wholesale Component prices is $15,000
  Full renewal price is $31,000

- Added Site Subscriptions:
  - $10,000 (New client)
  - $10,000 (Renewal Client)

- Extra copies - $790 per report

- *New Subscribers* - All new clients to receive prior year's *Market Analysis Report* with subscription.

- All other reports available to new subscribers at wholesale prices.

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2. Report Pricing

CODE	Component	Wholesale ($)	Retail ($)
1992 REPORTS			
NENS2	Network Services Market	5,000	6,000
NEVR2	Network Services Competitive analysis	5,000	6,000
NECN2	Major corporate Network Management Requirements	5,000	6,000
NECS2	Network Services Customer Satisfaction	5,000	6,000
NEEU2	End User Network Services	5,000	6,000
NENSP	Research Bulletins	NC	NA
1991 REPORTS			
NETO1	Opportunities in ISDN and Other Emerging Technologies—Western Europe, 1991-1996	1,500	3,000
NEIS1	User Issues in Network Services—Western Europe 1991-1996	1,500	3,000
NEFN1	Financial Network Services—Western Europe, 1991-1996	1,500	3,000
NEED1	The Western European EDI Market, 1992-1996	1,500	3,000
NENS1	The Network Services Market—Western Europe, 1992-1996	1,500	3,000

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Direct Mail

P = original plan ◯ = In process
✖ = mailed N = new *=1991

DIRECT MAIL 1992—Europe

	REP PUB DATE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
IEMAP—													
*MEAR1-1991 Annual Report	12/91	✖											
*MENR1-Nordic Report	91		✖										
*MEBE1-Benelux Report	91		✖										
*MECO1-Collaboration & M&A													
IEIB2-Banking and Finance				✖		✖	✖						
IEII2-Insurance						~~P~~	✖						
IEID2-Discrete Manufacturing							P						
IEIP2-Process Manufacturing							P						
IEIR2-Distribution											P		
IEIT2-Transportation													
IEIU2-Utilities													
IEAR2-1992 Annual Report									P			P	
IENR2-Nordic Report										P			
IEBE2-Benelux Report										P			
IEMO2-Delivery Mode Analysis Forecast													
IEOS2-Impact Of Open Systems on IS Mkt													
IERE2-Impact of User Re-engineering on IS Mkt	5/92		✖				✖						
CECSP—													
CEVS2-Vendor Service Strategies								P					
CESO2-Platform Systems Operations Services						P							
CESM2-Customer Services Mkt Analysis & Frcst										P			
CEIM2-Multi Vendor Maintenance						P							
CEDT2-Customer Services for the Desktop User	6/92			✖									
CEQSR-Service Update													
CERE2-Impact of Downsizing on Cust Srvcs													
CETS2-Trends Analysis													
CEUL2-Large Systems Satisfaction													
CEUM2-Medium Systems Satisfaction													
CEUS2-Small Systems Satisfaction													

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P = original pl[illegible] ◯ = In process
✖ = mailed *=1991

DIRECT MAIL [illegible]92—Europe

	REP PUB DATE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
SESMP—													
*SESM1—SO W.E—Mkt Analysis & Frcst, 91-96	12/91												
*SESV1—Vend Allian & Strat E. SO Mkt, 91-96	12/91												
*SESC1—Client Issues in W.E. SO Mkt 91-96	12/91												
*SENM1-Ntwk Mgmt as an SO Opp., 91-96	5/91												
4 reports		✖											
SEIC2-User Re-engineering Driving SI					P								
SEIM2-SI Market Analysis & Forecast									P				
SEIN2-Impact of Downsizing on SI Contracts								P					
SEIV2-SI Vendor Strategies				P									
SECA2-Country Analysis													
SETS1-Imaging Opportunities W.E.			✖										
OEOSP													
OESO2-Systems Operations					P							P	
OECS2-Outsourcing Communications Operations								P					
OEAM2-Outsourcing Applications Management									P				
OEDT2-Outsourcing Desktop Services	6/92		✖ ←	P			✖						
OEMF2-Outsourcing Information Services Market										P			
OEBS2-Outsourcing Business Operations													
OEVP2-Outsourcing Competitive Analysis													
OECA2-Outsourcing Country Analysis											P		
NENSP—													
*NEED1—W.E. EDI Developments, 91-96	1/92											P	
*NEFN1—Financial Ntwrk Srvcs W.E., 91-96	12/91												
*NEMS1—Market Analysis	91												
*NETO1—Technology Opportunities	9/91												
*NEIS1—User Network	7/91												
5 Reports		✖											
XEML1-			P										
FOR US REPORTS													
*UIIS4-Putting Downsizing in Perspective		✖											
*UIIS2-Open Systems Opportunities		✖											
UIDCS/UIDSA-Sys. Artc/Case Studies-Downsizing				✖									

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LEMAP

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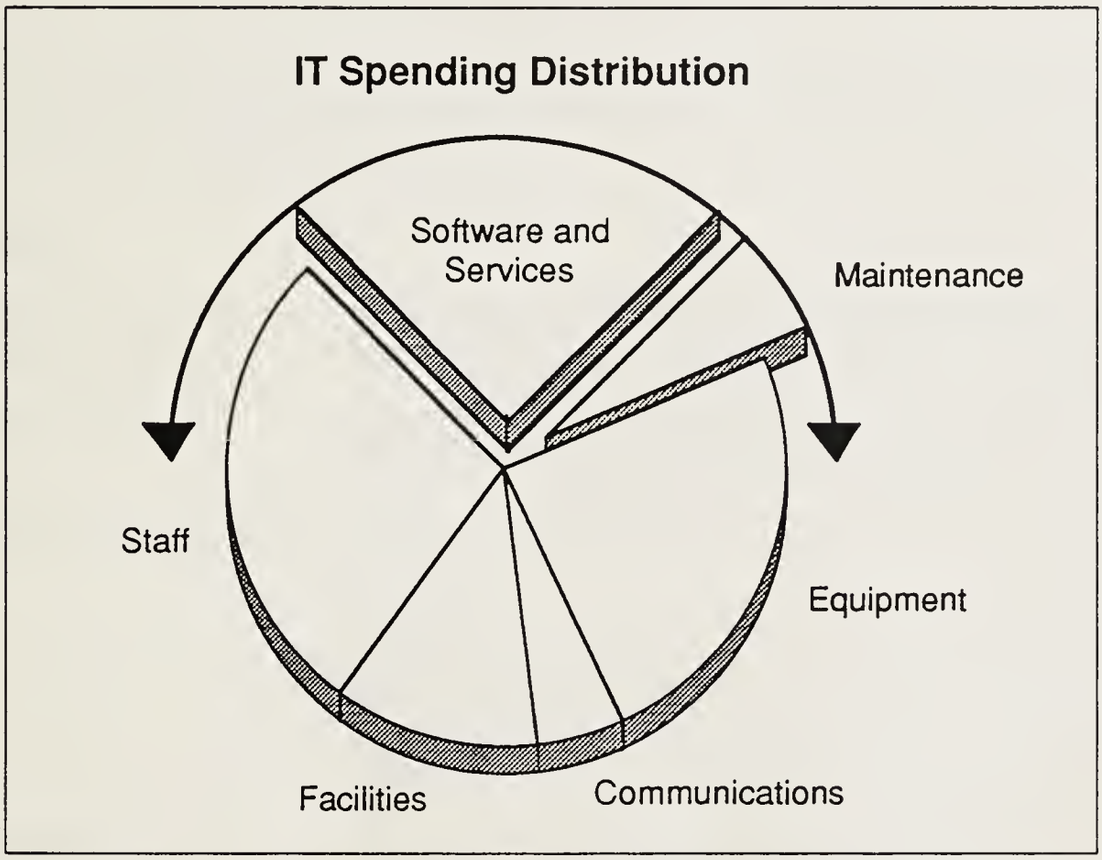

Analyses the fast-changing market for computer and communications software and services in the 1990s.

- **Analysis of Customer Needs**

- **Market Size and Growth by**
  - **Industry**
  - **Cross-Industry**
  - **Product/Service**

- **Competitive Information**
  - **Leading Vendor Profiles**
  - **Market Positioning**
  - **Strategies**

- **Impacts of**
  - **Downsizing**
  - **Economy**
  - **Open Systems**
  - **Outsourcing**
  - **Networking**
  - **Re-engineering**

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Information Services Programme—Europe

SUMMARY

Analyses the rapid changes in user spending on software and services and the new business opportunities for the industry in the 1990s. In-depth research covers 17 countries and key industry sector markets.

REPORTS

Information Services Market Sourcebook	Complete analysis, forecasts, and commentary on the software and services market for each of 17 countries.
Forecast Database	Detailed forecasts in local currencies, dollars and ECU showing market sizes for every subsector.
Industry Sector Reports	*National Governments* *Transportation* *Insurance* *Banking and Finance* *Discrete Manufacturing* *Process Manufacturing* *Retail & Wholesale Distribution*
Issue Reports	*IT Spending Patterns—Europe, 1992-1997* *Software Re-engineering in Europe* *IT Services—Growth or Decline?*
Vendor Reports	Profiles of leading software and services vendors.
Research Bulletins	Regular reports on INPUT research findings and analysis of important industry announcements, trends and issues.

SERVICES

Telephone Enquiry	Use the "hotline" to obtain answers to your immediate questions.
Access to INPUT Consultants	Obtain opinions and advice from INPUT executives and consultants from meetings, mail, fax, and the telephone.
On-Site Visit	Discuss your issues and concerns, introduce experts to your organisation, and obtain presentations on industry trends.
Client Meetings	Review and debate recent research results and network with executives from other INPUT clients.

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Information Services Programme—Europe

BACKGROUND AND BENEFITS

Rapidly changing markets and intensifying industry competition have always been key characteristics of the information services industry. Today, revolutions such as downsizing, networking and outsourcing are closing out old markets, creating new opportunities and bringing new competitors.

The emergence of Eastern Europe and the general economic recession have created great uncertainty for the future, in stark contrast to the past environment of seemingly unlimited growth for the software and services industry.

These factors are coinciding with more sophistication among buyers, resulting in major changes in the pattern of user spending on information systems, particularly software and services.

New strategies and tactics are required for both new and established players.

The **Information Services Industry Programme** meets the needs of executives, planners and professional marketing staff as they face the intensifying challenges.

Know Your Market	The market is changing rapidly; in some cases discontinuously. This programme enables you to keep on top of, and indeed to predict, such changes.
Competitive Strategy	Understand what new competitors and key vendors are doing in the market. Plan distribution channel strategy and competitive positioning. Identify potential partners or allies.
Opportunities	Identify user requirements and "hot" market issues. Make informed decisions. Avoid wasted time and energy: focus on real needs.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary vendors through client meetings and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.

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Information Services Programme—Europe

PROGRAMME DESCRIPTION

This programme analyses trends, issues, competition and opportunities in the rapidly changing information services industry and market.

- Provides continuing market analysis and five-year forecasts for the entire software and services industry across 17 countries. User and vendor issues, market drivers and inhibitors are analysed.
- Focuses on the opportunities that are developing from users' increasing demand for application solutions rather than just information system platforms.
- Researches key industry sectors to identify trends, issues, competition and opportunities unique to each sector's economic and competitive environment.
- Provides detailed descriptive profiles of significant vendors to support the analysis of the competitive market environment.
- Creates a professional support relationship between clients and INPUT's senior professional staff that emphasises the communication of key research insights, trend information and marketing ideas and that can be flexible and adaptive to clients' evolving needs.

RELATED INPUT PROGRAMMES

Information Services Industry Programme—U.S.

Systems Integration Programmes (U.S. and Europe) analyse opportunities for vendor-provided solutions to complex information systems, communications, and automation requirements.

Outsourcing Information Systems Programmes (U.S. and Europe) analyse trends, issues, competition and opportunities in the rapidly expanding outsourcing markets.

Customer Services Programme—Europe analyses the trends, issues, competition and opportunities in diverse systems maintenance markets.

Information Services Vendor Analysis Program—U.S. provides profiles and capabilities analyses of information services vendors.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

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CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Consultant Access	Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.
On-site Presentation	INPUT consultants present and discuss research findings at your site. Research presentations can be tailored to focus on your needs. Discuss specific interests and issues in confidence. This presentation is an excellent method of distributing key information through the organisation and of obtaining more users of the research materials.
Client Meetings	Meetings, held regularly throughout the year in various European locations, enable you to meet other clients and INPUT's professional staff. Review research projects and discuss market trends and issues. The format of these meetings and their focus on one or two key areas allow in-depth discussion and full client involvement.
Telephone Enquiry Service	Satisfies requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
Site Subscriptions	Complete programme services to additional sites at substantially reduced fees.

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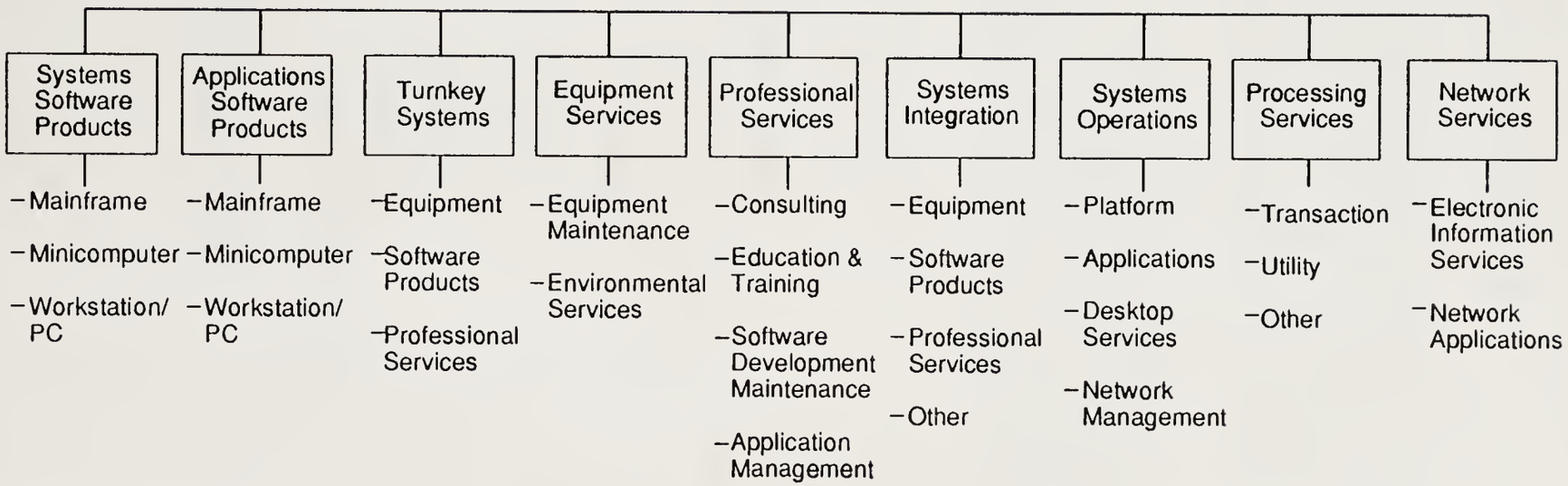
Information Services Industry Structure



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Information Services Programme—Europe

MARKET REPORT DESCRIPTIONS

European Market for Software and Services, 1992-1997
A complete analysis of the European market on a country-by-country basis—the countries covered are listed in the table, *Geographic Scope*. Each country is analysed across all of INPUT's delivery modes. Leading vendors in each country and market sector are identified and ranked. The market commentary covers major economic, user and vendor issues; future trends and opportunities are identified.

Information Services Market Forecast Database
Market forecasts are published in detail as tables for each country showing size and growth year by year. The base data is provided in local currency and forecasts take account of inflation and market trends in all the subsectors identified earlier. The same data is provided converted to dollars and ECUs for rapid comparison between countries and for consolidation into a full European forecast.

SCOPE OF SERVICES

GEOGRAPHIC SCOPE

Austria	Italy
Belgium	Netherlands
Denmark	Norway
Eastern Europe*	Portugal
Finland	Spain
France	Sweden
Germany	Switzerland
Greece	United Kingdom
Ireland	

* Czechoslovakia, Hungary, and Poland

INDUSTRY SECTORS

- Banking and Finance
- Insurance
- Discrete Manufacturing
- Process Manufacturing
- Distribution
- Transportation
- National Government
- Others

Information Services Programme—Europe

INDUSTRY SECTOR REPORT DESCRIPTIONS

Software and Services Opportunities in National Governments
This report assesses the size and growth of national government markets and the impact of change on vendors. Have open systems fulfilled their promise of lowering costs? Governments were early adopters of open systems standards in their attempts to downsize project budgets and create more price competition. The research identifies the key factors influencing the profitability of business in this sector.

Software and Services Opportunities in Transportation
The single European market is being formalised in 1993. INPUT's research identifies the impact on the software and services vendors as suppliers to this industry. Transport is a key element in Europe's supply chains and the study highlights how EDI and electronic commerce are expected to play a lead role in such businesses.

Software and Services Market—Insurance Sector
In the insurance sector, INPUT breaks down the market into life, non-life and reinsurance. Regulatory issues affecting the market are discussed, and there is a review of merger and acquisition activity, which is one of the driving forces for software and services in this sector. Five-year forecasts are updated to reflect current trading conditions.

Software and Services Market—Banking and Finance Sector
INPUT's banking and finance sector report explains how banking and finance markets are restructuring and details how this will affect software and services vendors. The report gives five-year market forecasts, profiles leading vendors and recommends vendor strategies for the 1990s in this fast-growing sector.

Software and Services Market—Discrete Manufacturing Sector
INPUT's discrete manufacturing sector report evaluates the impact of trends in this sector on the software and services market. Software and services vendors active in the manufacturing sector will find this report provides them with detailed up-to-date market forecasts, identifies the leading vendors and the key opportunities available. This report can make a valuable contribution to vendor companies' strategic planning.

Software and Services Market—Process Manufacturing Sector
This companion volume examines the issues and trends in the process manufacturing sector and assesses their impacts on the software and services market. The report will help vendors, and those considering entering this market, to plan their future strategies by providing detailed revised five-year market forecasts and identifying key opportunities.

Information Services Programme—Europe

INDUSTRY SECTOR REPORT DESCRIPTIONS *(Continued)*

Software and Services Market—Retail & Wholesale Distribution Sector
This report analyses the market for software and services in the distribution industries. Software and services vendors can establish what the major trends, issues and opportunities are, and are provided with market forecasts for wholesale and retail activities in France, Germany, Italy, the U.K. and the rest of Europe.

ISSUE REPORT DESCRIPTIONS

Software Re-engineering in Europe
This report analyses the use of CASE tools and methodologies in applications development by IS departments. Software and services vendors have traditionally concentrated on new application projects. INPUT's research identifies the size and growth in the use of these tools and the likely timescales in which re-engineering will become a common practice. Re-engineering existing applications within a modern software engineering environment may become the major opportunity for CASE product and service vendors in the 1990s.

IT Services—Growth or Decline?
This study questions the wisdom of assuming that the market for IT services will continue to grow. The falling price of open systems hardware has led many equipment vendors to look for a larger and larger contribution and added value from software services. The research identifies market drivers and inhibitors such as increasing price competition, the arrival of re-usable software applications, and the move of applications into the hands of the desktop user. These factors all raise doubts as to whether clients will continue to demand more service from the industry.

IT Spending Patterns—Europe, 1992-1997
This study puts individual market trends into the context of overall spending on information systems (IS). A high-level analysis of user spending compares internal and external expenditure and the anticipated changes in such spending patterns. It shows the breakdown of spending in-house on staffing and facilities against bought-in products and services such as software, hardware, networking, processing and professional services.

Leading Vendor Competitor Analysis
The leading software and services vendors in the European market are profiled. Each report analyses a key vendor, its financial performance, the products and services offered, its segmented revenues within industry sectors and by country and delivery mode, and identifies specific changes occurring in the vendor's market focus or position.

Information Services Programme—Europe

CURRENT REPORT DESCRIPTIONS

Processing Services Opportunities, 1991-1996
There will be a major restructuring of the transaction processing market over the next decade. This report will help vendors understand what changes are taking place and how they are affecting businesses. Research shows that there are significant opportunities available for vendors, despite a decline in growth rate. The report provides market forecasts and vendor rankings, with percentage market shares for each vendor.

Professional Services Opportunities, 1991-1996
This report provides market forecasts and growth rates for the European professional services market and assesses the impact of the trends in the marketplace on professional services vendors. It also discusses users' concerns and requirements so that vendors can evaluate their strengths and weaknesses. The report identifies leading vendors, providing valuable competitive information.

Software Application Solutions Opportunities, 1991-1996
This report forecasts the size of the application solutions market, identifies the leading vendors and discusses the trends affecting the market in each European country. It discusses the opportunities for applications software products and turnkey systems. It discusses market issues such as industry standards, quality and integration. The report provides valuable market intelligence for companies involved in selling and marketing software products.

Systems Software Product Opportunities, 1991-1996
This report examines the market for systems software products, segmented into systems control products, applications development tools and data centre management products. The report discusses trends such as the move towards distributed processing and assesses the likely effect on the systems software market. The impact of open systems is also discussed. Companies offering systems software products can find in this report valuable market size and growth data, analysis and competitive information.

Education and Training
This report surveys developments in education and training in the software and services industry, examining issues such as skills shortages and retraining. This report can help vendors of education and training services to assess the level of interest in various types of training services by examining the requirements for training and providing data on levels of satisfaction with training standards. The report also highlights differences in European countries, and discusses governmental issues.

Information Services Programme—Europe

CURRENT REPORT DESCRIPTIONS *(Continued)*

Software Applications Maintenance
This report examines the specific area of user-written software applications maintenance. It identifies the business opportunities in this rapidly developing business sector of the professional services market. The report also addresses such issues as the use of reverse engineering tools and provides market sizing and competitive information.

UNIX Market Opportunities
UNIX has become an important operating system as suppliers move away from their own proprietary systems. This report examines the opportunities being created in this market for consulting services and other professional services, software products and related areas. The report provides European country market analyses and competitive information.

Collaboration and M & A Issues
As European software and services companies plan their business strategies for the 1990s, many are entering new markets by entering into partnerships and acquisition activity. As companies compete against pan-European giants in a single market, it is becoming essential for them to quickly acquire market penetration into new countries, or to be able to offer new skills. This can be achieved by establishing partnerships or by seeking to acquire companies already operating in target markets. This report examines the issues and discusses the implications of such strategic activity.

Information Services Programme—Europe

RESEARCH BULLETINS

Research Bulletins are frequent, short reports that:

1. Present results from research studies as quickly as possible. These Research Bulletins communicate key findings on issues, trends, new developments and ideas, market forecasts, and vendor analysis.
2. Provide INPUT's analyses of important industry announcements, events, awards, and other activities. These Research Bulletins analyse the meaning of these activities rather than just give the news.

Research Bulletins already published that are provided immediately include:

- *Processing Services Markets*
- *Application Integration*
- *Financial Deregulation Creates Major New Opportunities for European Software and Services Vendors*
- *European Software and Services Market—Insurance Sector*
- *Market Analysis and Forecast for Western Europe—Distribution Industry Sector*
- *Software Product Specialisation in Discrete Manufacturing Drives Collaborative Ventures*
- *Preliminary Market Forecast for Western European Discrete Manufacturing Sector*
- *The Five Stages of Information System Development in Distribution Companies*
- *Preliminary Market Forecast for Western European Process Manufacturing Sector*
- *New Opportunities in Western European Process Manufacturing Sector*
- *Integration of Supervisory Control and Production Management Systems Now Imminent in the Process Manufacturing Sector*
- *European Professional Services—Market Trends*
- *European Professional Services Market Forecast*
- *Consulting and Account Management Are the Keys to the CIM Market*
- *UNIX Software and Services—European Market Issues*
- *Impact of UNIX on Software and Services Vendors*
- *UNIX Systems Software Products—European Market Forecast*
- *Software Support and Maintenance—Western European Market*
- *Daimler-Benz/Sogeti Alliance Raises Stakes for Global Leadership in Information Services*
- *Third-Party Software Support and Maintenance—User Profiles*
- *CA90s and ENTIRE—New Systems Software Architectures*
- *CAP Gemini Selects Insurance for Growth*
- *IBM's IAA Fosters Mix-and-Match Insurance Solutions*
- *The Role of Applications Software Products in the Banking Industry*

Information Services Program—Europe

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The Western European Market Forecast for Computer Software and Services, 1991-1996

- Find out how recession and downsizing have dampened growth
- Anticipate future market directions
- Identify leading industry vendors
- Plan your company's market strategy

This report is available immediately

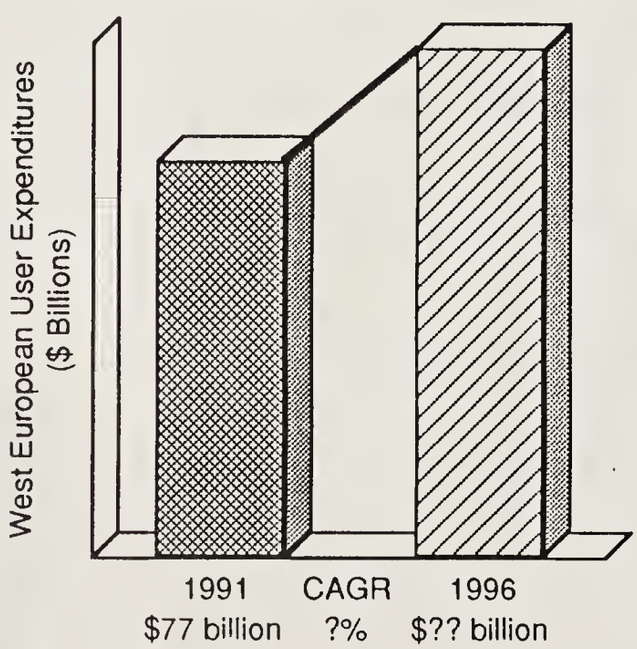
Software and Services—the Opportunity for the 1990s

What Is the Industry Outlook?

INPUT's annual survey of the European computer software and services market can help you anticipate the way the market is moving and plan accordingly.

The past decade has seen the European software and services industry growing at an average rate of over 20% per year, but this growth has slowed dramatically. It is unlikely that the industry as a whole will ever see such rapid growth again, except in small innovative niche areas of the market.

Western European Market for Computer Software and Services, 1991-1996



INPUT Provides the Market Information You Need

Software and services vendors need, now more than ever, detailed information about the performance, status and growth potential of the market. INPUT's latest report can help vendors identify the best market opportunities for their products and services.

This comprehensive report covers:

- 16 European country markets
- 10 industry sectors
- 8 delivery modes

The report is the distillation of a year's research into one volume, providing up-to-date, in-depth data on your markets.

Industry trends are discussed in the report, which can help your organisation understand their impact so that you can plan ahead. Among the trends discussed are:

- The growth in *partnerships* and *acquisitions*
- The trend towards *outsourcing*
- The impact of *downsizing*
- The effect of the *recession*: short term or long term
- The widening *gap in revenues* between global and smaller vendors

Competitive Information to Position Your Company

Information about main competitors is key to success. INPUT's report identifies

- Top 30 vendors in Europe as a whole
- Top 10 vendors in Europe for each of the 8 delivery modes
- Top 30 vendors for each major country market

- Top 10 vendors for each delivery mode in each major country market
- Top 10 vendors in each smaller country market

You can identify the market leaders in each country and in each delivery mode, allowing you to position your company against your competitors and identify new market entrants. The report also evaluates some of the leading vendors, discussing their market positions and strategies. Key vendor issues are addressed, such as:

- The need for industry sector skills
- The demand for full-service strategies
- Risk management

Discover the effects of the 3 main industry driving forces:

- Outsourcing
- Networking
- Downsizing

These three driving forces are key to understanding the development of the software and services industry. INPUT's report discusses their impact and assesses the changes that they are likely to bring about.

Outsourcing is changing the delivery of information services. How extensive will its impact be?

Networking is one of the fastest growing market sectors as the trend towards desktop computing continues. How is new technology impacting on this market?

Downsizing means that there are plenty of new business opportunities—but it often means downsizing of budgets as well. Downsizing will change the industry beyond recognition over the next decade. How can vendors prepare for this?

Benefit from INPUT's In-Depth Annual Research Programme

This report is based on INPUT's annual programme of vendor and user research, which is carried out by a mix of in-depth face-to-face, mail and telephone interviews with senior executives.

Summary Table of Contents

Market Overview and Forecasts

The Western European Opportunity
- Key Vendor Issues
- Industry Driving Forces

Market Sector Analysis

Sector Commentaries on:
- Market Overview and Structure
- Market Size and Growth, 1991-1996
- Market Dynamics
- Competitive Environment

for each of the following delivery modes:
- Processing Services
- Turnkey Systems
- Applications Software Products
- Systems Software Products
- Professional Services
- Network Services
- Systems Operations
- Systems Integration

Country Market Analysis

Country Market Commentaries on:
- Economic Environment
- Software and Services Industry
- Competitive Environment

for 16 European countries:

France	Netherlands
Germany	Belgium
United Kingdom	Switzerland
Italy	Austria
Sweden	Spain
Denmark	Portugal
Norway	Greece
Finland	Ireland

Country Market Forecasts and Leading Vendor Lists
- Forecasts in Dollars
- Forecasts in Local Currencies
- Forecasts in ECUs

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About INPUT

INPUT provides planning information, analysis, and recommendations for the information technology industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions. Subscription services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services. INPUT specialises in the software and services industry which includes software products, systems operations, processing services, network services, systems integration, professional services, turnkey systems, and customer services. Particular areas of expertise include CASE analysis, information systems planning, and outsourcing.

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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Target financial markets with INPUT's latest reports on the Banking and Insurance sectors

European Software and Services Markets 1992-1997

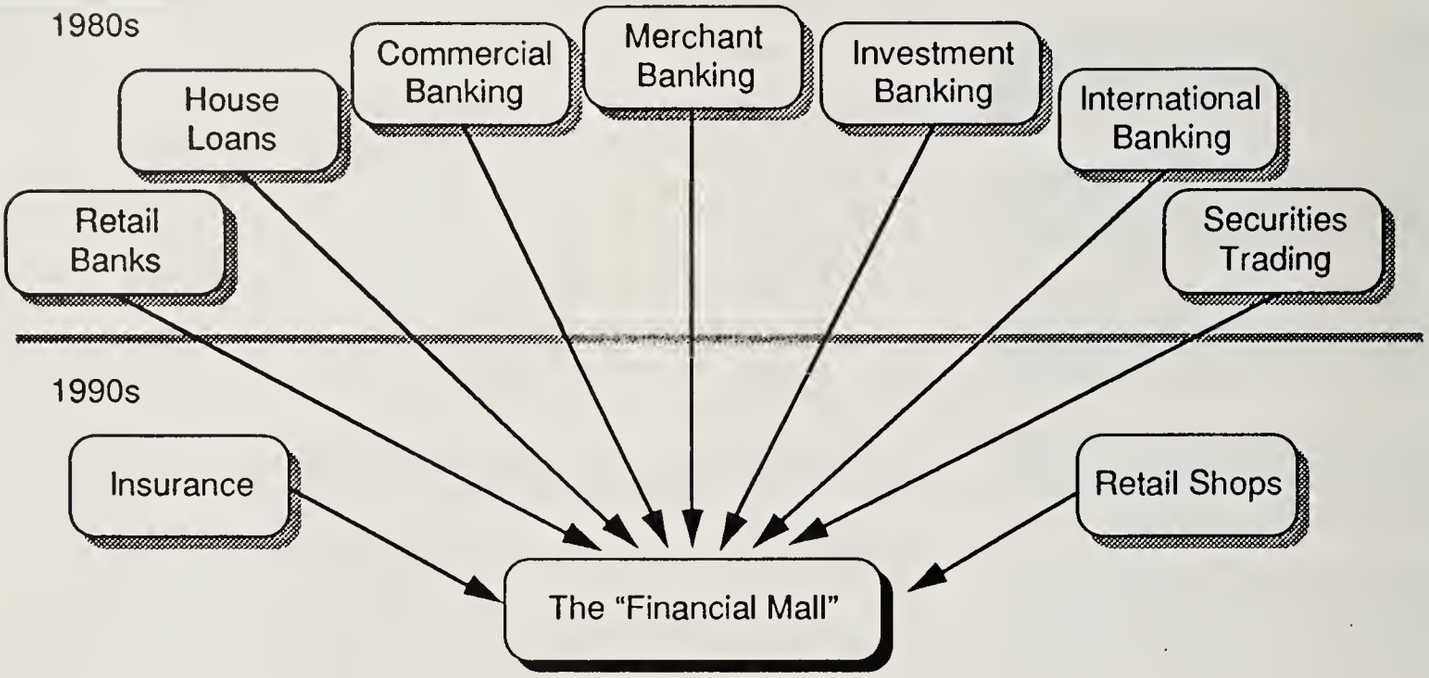
- Banking and Finance Sector
- Insurance Sector

Benefits of INPUT's Reports

Maximise your revenues from the financial sectors of the software and services markets by identifying...

- Trends in the financial sector
- Your competitors and their strengths and weaknesses
- The size of the market and growth prospects for the future

Banking and Finance Market Structure 1980s and 1990s



How Are Financial Markets Evolving?

Vendors providing software and services to the banking and finance sector need to understand how the market changes are affecting the financial institutions, and how they must adapt their information systems accordingly. Traditional boundaries between the different types of banks and other financial institutions continue to become more blurred. At the same time, the boundaries between insurance and banking institutions are being confused by the banks diversifying into becoming insurance intermediaries.

What Are the Opportunities for Your Products and Services?

Both the banking and finance report and the insurance report provide an analysis of user expenditure by delivery mode:

- Processing services
- Network services
- Software products
- Professional services
- Turnkey systems
- Systems integration
- Systems operations

You can use this information to identify the types of services that are in greatest demand. The reports discuss the trends in each delivery mode and give examples of specific opportunities within each, providing you with a clear understanding of the market.

How Are Your Competitors Performing in Financial Markets?

Both reports contain an assessment of the competitive environment. Knowing who your competitors are, and their strengths, weaknesses and strategies can help you position your company in the market and evaluate the strategic direction you should be taking. INPUT's reports provide lists of the top vendors in each country, and profiles of some of these leading vendors.

What Are the Trends in the Banking and Finance Sector?

The early 1990s have seen difficult trading conditions for the banks. On the one hand, they are diversifying into new markets, but on the other hand,

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About INPUT's report, European Software and Services Markets, 1992-1997...

☐ ***Banking and Finance Sector for £1,500*** ☐ ***Insurance Sector for £1,500***

☐ ***Please send me BOTH reports for £2,500***

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they have been hit by economic recession and have undergone merger activities in order to improve their market position. INPUT's banking and finance report discusses these trends and assesses the opportunities that arise as a result of this major restructuring. Banking systems have traditionally evolved around the customer account as the service product, but now they need to re-orientate towards a total customer service approach.

Find Out INPUT's Forecast for the Banking and Finance Sector

INPUT estimated that the banking and finance sector had a 20% share of the overall software and services market in 1991. INPUT's latest report updates this market forecast providing:

- Percentage share of the overall market held by banking and finance companies in the U.K., France, Germany, Italy and Spain
- Market forecast and growth rate for the period 1992-1997 for Europe in banking and securities companies

Insurance Sector Faces Change

Deregulation, increased competition, rapid technological developments and the gradual penetration of banks into traditional insurance markets have all contributed to changes in the insurance industry. The insurance industry is consolidating and a number of cross-border alliances have occurred as organisations seek to provide operations on a pan-European scale. IT investment in the insurance sector is already quite high, and INPUT expects this investment to increase over the next few years. INPUT's report on the insurance sector will help you understand the changes taking place and can help you plan for the future.

Find Out INPUT's Forecast for the Insurance Sector

INPUT divides the insurance sector into three subsectors:

- Life
- Non-life
- Re-insurance

Market size and growth rates are provided for each sector, and the trends particular to each are discussed. The report provides market forecasts for software and services in the insurance sector for France, Germany, the U.K., Italy, Spain, Switzerland, Benelux and Scandinavia.

These reports can make a valuable contribution to your market planning processes in the banking and insurance sectors now.

Take advantage of INPUT's experience and expertise in these two industry sectors and order your copies.

If you are involved In supplying software and services to the European banking and finance or insurance sectors, you need to know:

- The size of the market and growth prospects for your products and services
- Who the leading vendors are, and what their strategies are for success
- How you can respond to the changes taking place in these markets:
  - Restructuring
  - Merger and acquisition activity
  - Blurring of traditional boundaries in banking and insurance services
- The effect of:
  - Recession
  - Downsizing
  - Outsourcing
  - Networking

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INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in Europe, North America, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

Since 1974, INPUT has compiled the most extensive research base available on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and on the impact of downsizing.

Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/ proprietary research, subscription-based continuous advisory programs, merger/ acquisition analysis and user satisfaction surveys.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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CASE is already reducing maintenance costs for over 40% of its users ...

This finding, and many more, are detailed in INPUT's study:

Software Re-engineering in Europe

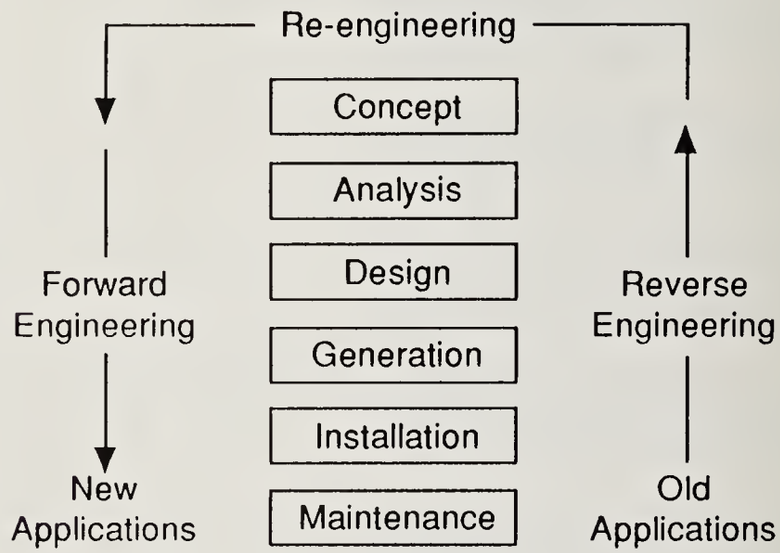
Tap the opportunity represented by your clients' maintenance workload ...

To profit from this opportunity, you need to know the answers to.....

- How quickly is the use of CASE tools and methodologies spreading?
- How do users measure the effectiveness of CASE tools?
- How much money are users investing in CASE tools?
- When will re-engineering become common practice?
- How do users view client/server architectures and object-oriented software?

INPUT's report* Software Re-engineering in Europe *has the answers to these, and more, questions.

The Software Life Cycle



INPUT's model of the software life cycle clearly shows the stages that a software project goes through. INPUT examines how vendors can help users to reverse engineer or re-engineer their applications.

Software and services companies have traditionally concentrated on providing products for *new* applications development. However, many of their clients are concentrating on maintaining *existing* applications—this takes up around 65% of the IS workload.

INPUT can help you take advantage of the opportunity to provide CASE tools and methodologies to help your clients re-engineer their existing software onto new platforms.

Why INPUT Is Qualified To Help You

This report is based on interviews with over 60 senior IS executives with responsibility for application development in France, Germany and the U.K. (the largest markets for CASE tools), and interviews with leading CASE and systems vendors. This enabled INPUT to produce an objective, unbiased view of how the market for software re-engineering is developing.

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INPUT provides clients with objective analysis and insightful opinions on software re-engineering in Europe

About INPUT's report, Software Re-engineering in Europe...

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The Benefits of this Report

- Find out how to unlock this potentially lucrative market by identifying:
  - The size of the market for CASE tools in Europe
  - Users' plans for using CASE tools over the next three years
  - The payback users expect to gain from CASE
  - How CASE is impacting users' in-house software maintenance expenditure
  - How users select a CASE product

The More You Know About Users' Needs, The Better You Can Satisfy Them

Maximise your company's success by reading INPUT's comprehensive review of this emerging market. Re-engineering software applications has enormous potential, and can help you keep your clients loyal to your products and services.

Use this report to gain a clear understanding of users' reasons for buying and using CASE tools for re-engineering software applications. The more you know about the way users view your products and services, the better you will be able to satisfy their needs.

Take advantage of INPUT's expertise in this area and order your copy of the report, *Software Re-engineering in Europe*.

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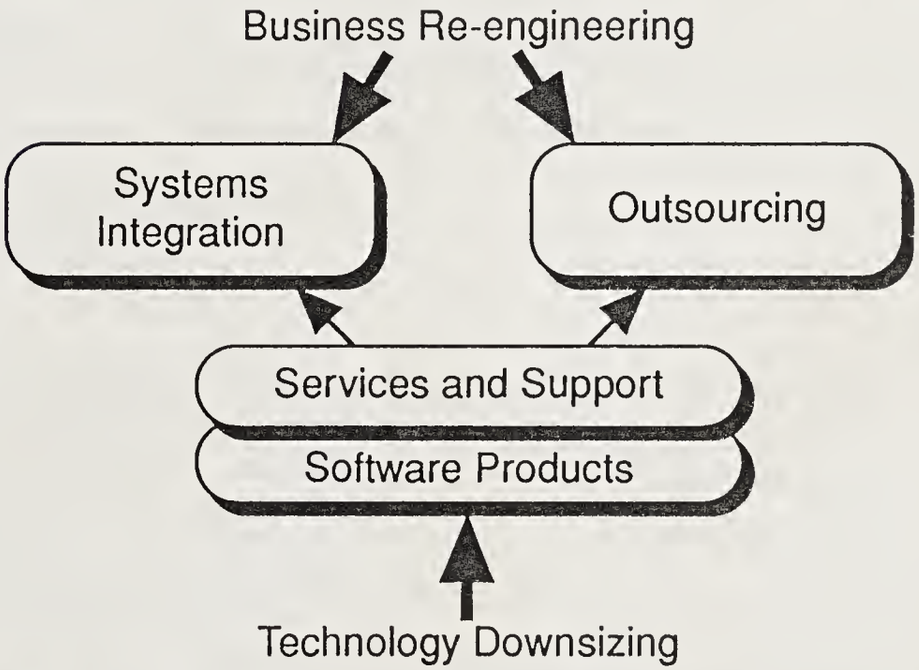
The Annual Reference for

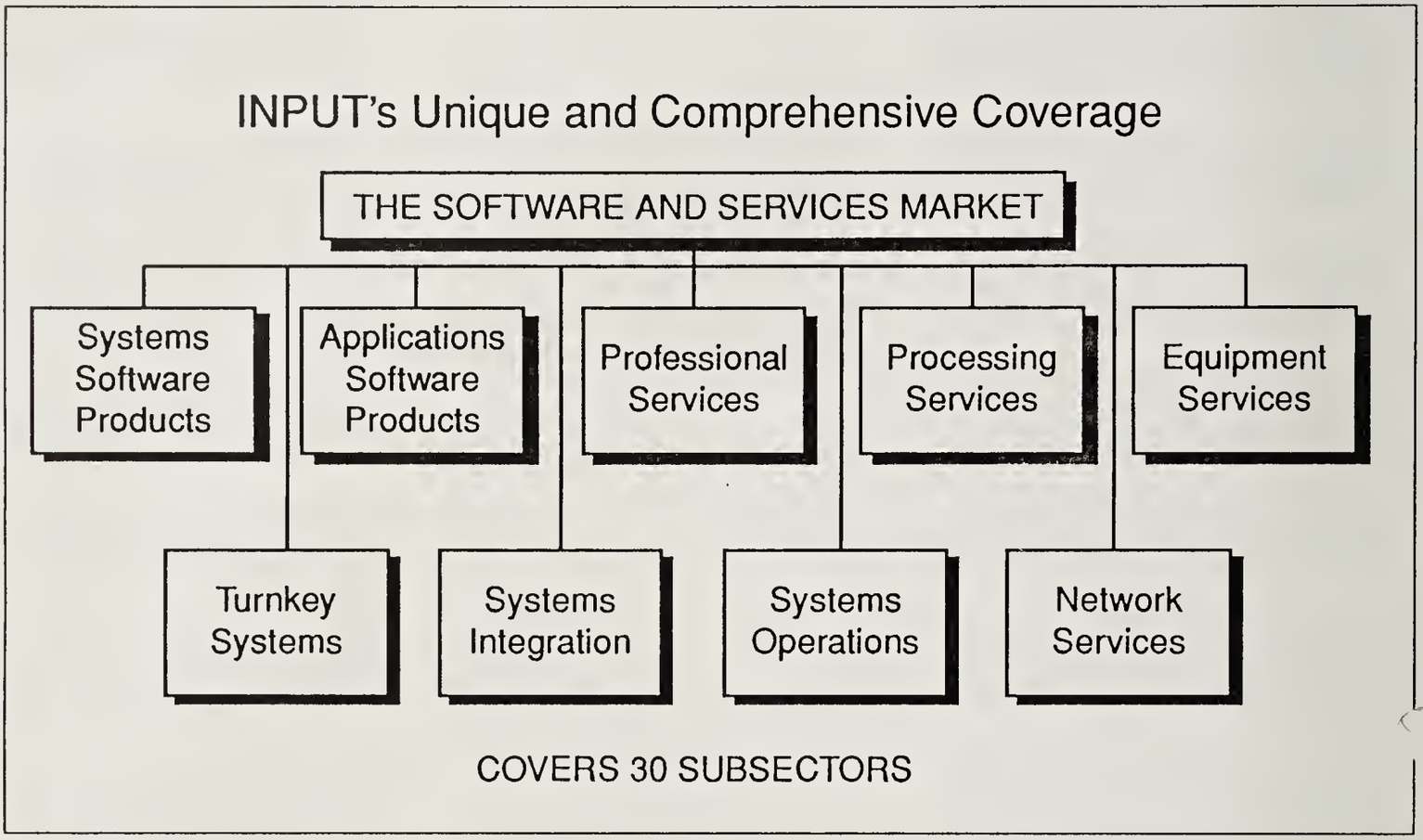
The Software and Services Industry Europe

12th Year of Publication



- Who's winning? Who's losing?
- How did the industry perform in 1991 and why is 1992 different?
- Where will the industry go in future?

Single Figure Market Growth Is Shaking Up the European Software and Services Industry



- Where are the high-growth opportunities in a downsizing environment?
- How are vendors responding to declining growth in a recessionary economy?
- Why are systems vendors a threat to professional services vendors?

INPUT's annual reference guide for the software and services industry in Europe helps to provide answers to these questions. It does so through the medium of a unique comprehensive coverage of the European market!

- Discover how the software and services business compares between 16 Western European countries and Eastern Europe.
- Within each country see the relative size and growth rates of 30 different subsectors—this year including equipment maintenance, environmental services, desktop services, network management and applications management for the first time.
- See how the market divides between the different industry sectors in the major countries.
- Get the definitive ranking of lead vendors in each major market.

Competing in a Revolution!

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Executive Perspective

Key Vendor Issues

Industry Driving Forces

Market Sector Analysis

Sector Commentaries on:
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- Market Size and Growth, 1992-1997
- Market Dynamics
- Competitive Environment

Industry Sector Analysis

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- Insurance
- Manufacturing—Discrete
- Manufacturing—Process
- Retail and Wholesale Distribution
- Transportation
- National Governments

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- Economic Environment
- Software and Services Industry
- Competitive Environment

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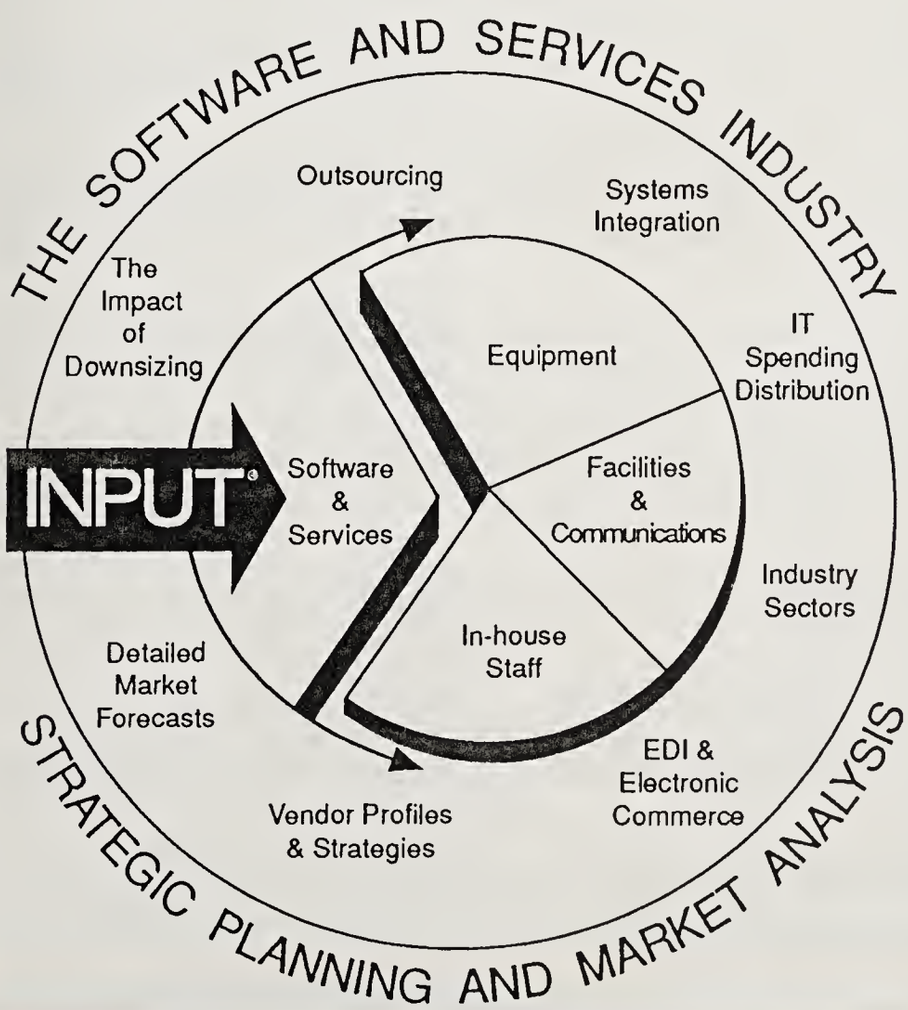

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Analyses the fast-changing market for computer and communications software and services in the 1990s.

- Analysis of Customer Needs
- Market Size and Growth by industry, cross-industry, product/service
- Competitive Information: leading vendor profiles; market positioning; strategies
- Impacts of downsizing, outsourcing, economy, networking, open systems and re-engineering

Custom Consulting

INPUT conducts over 100 primary research studies for clients every year, many focused on downsizing topics. These have included analysis of product introductions, marketing strategies, competitive analysis and vendor merger/acquisition study. For users, INPUT has evaluated specific applications, costs of downsizing, vendor evaluation and the potential for outsourcing.

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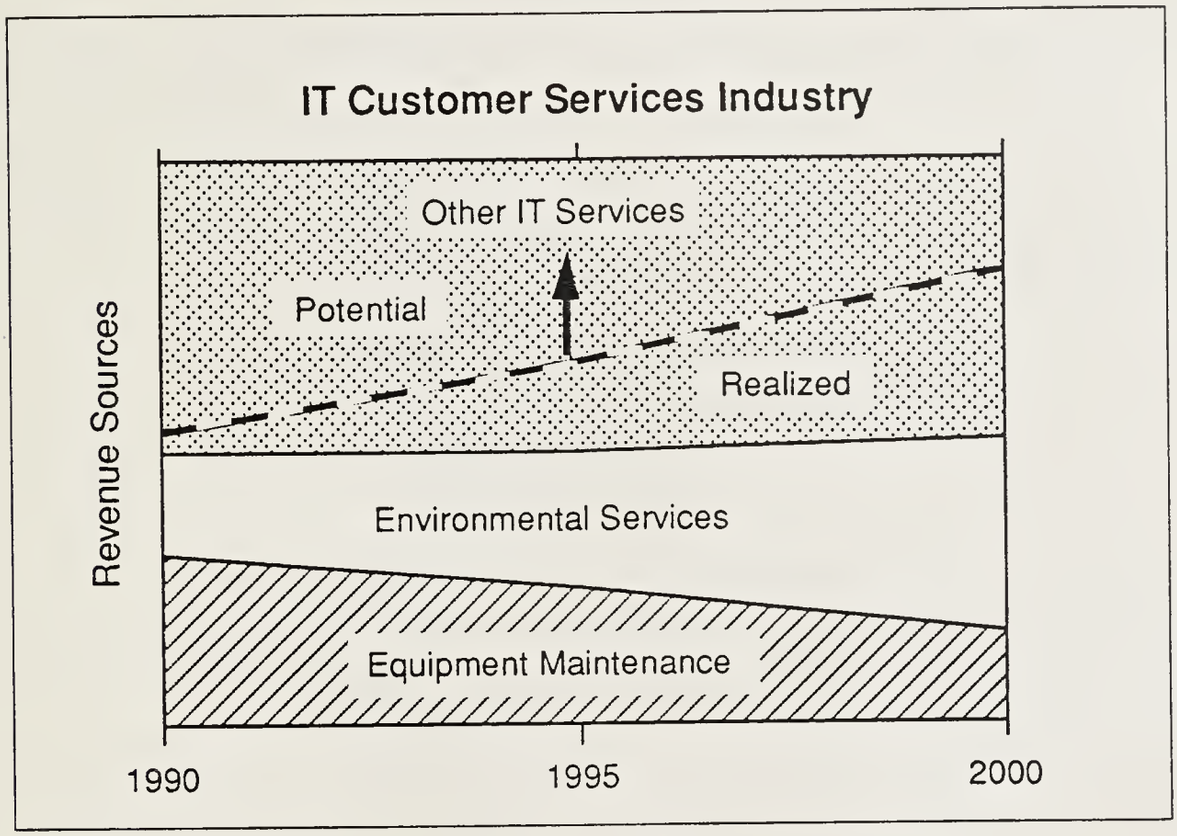

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- **Traditional Services—Customer Satisfaction Measurements**
  - Equipment Maintenance
  - System Software Support
  - Education and Training

- **New Services—Market Opportunities**
  - Outsourcing
  - Network Integration
  - Desktop Services
  - Professional Services
  - Environmental Services
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REPORTS

Professional Services Strategies

Impact of Downsizing on Customer Services Organisations

Open Systems Services

IT Customer Services Market, 1992-1997

IT Customer Services Satisfaction Analysis
- *Large Systems*
- *Midrange Systems*
- *PCs/Workstations*

IT Customer Services Trends and Issues

European Multivendor Maintenance Markets, 1992-1997

*Software Support Issues in Customer Services**

*Channel Support Issues in Customer Services**

*Environmental Services Opportunities for Customer Services Vendors**

*Independent Maintenance Market**

Service Update — Monthly publication that tracks events and developments in the customer services industry.

Research Bulletins — Regular reports on INPUT research findings and analysis of important industry announcements, trends and issues.

* *Reports available immediately from 1991 research*

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On-Site Visit — Discuss issues and concerns, introduce experts to your organisation, and obtain presentations on industry trends.

Client Meetings — Attend focused reviews of market trends. Discuss issues with other clients and INPUT's professional staff.

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Customer Services Programme—Europe

BACKGROUND and BENEFITS

The traditional equipment services market is declining in the face of technological advances and downsizing. However, the increasing complexity of systems in a multivendor environment and increasing user reliance on systems means there is greater need for supporting services. The challenge for customer services executives is how to increase revenues and income by meeting these needs whilst dealing with erosion of their traditional equipment services business.

To meet these new market requirements, customer services executives must be able to:

- Plan the development of revenue streams in new service modes.
- Manage users' changing system needs by retraining and redeploying staff.
- Continue to provide the traditional levels of support on existing systems platforms.

Keep on Top of this Revolutionary Market	Revolution (dramatic, non-linear change) is happening in customer services. This programme enables you to keep on top of, and indeed to predict, such changes.
Competitive Strategy	Identify what key vendors are doing in this market. Plan strategy, tactics, and competitive positioning.
Opportunity Identification	Identify user requirements and "hot" market issues. Make informed decisions. Avoid wasted time and energy: focus on the real needs.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.
Product Improvement	Use the objective measurements of service levels to improve quality and address gaps in service coverage.
Market Quality Improvements	Evaluate conformance with quality assessment programmes such as BS5750 and ISO 9000.
Use INPUT's Track Record	INPUT has been monitoring and reporting on the U.S. and European customer services markets for 15 years.

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Customer Services Programme—Europe

PROGRAMME DESCRIPTION

The **Customer Services Programme —Europe** provides:

- Measurement of user satisfaction with both traditional and new services
- Measurement of market sizes and growth rates
- Analysis of key issues affecting new trends and opportunities

INPUT conducts research across the whole of Europe, providing the latest trend and attitude data. Research is undertaken with both buyers and vendors of information systems and services. This provides gap analysis showing differences in practices and views between these two sides of the industry.

INPUT maintains a database of customer satisfaction and user expenditure information across all country markets in Western Europe. Information on Eastern European countries is being added to make this the single, most comprehensive set of information on customer services and information services in Europe.

Clients participate in identifying key research issues and formulating specific questions.

RELATED INPUT PROGRAMMES

Outsourcing Information Systems Programme (U.S. and Europe) provides research on the revolution in systems operations, network operations, applications management and desktop services opportunities.

Systems Integration Programmes (U.S. and Europe) analyse opportunities for vendor-provided solutions to complex information systems, communications, and automation requirements.

Information Services Market Analysis Programmes (U.S. and Europe) provide forecasts, trend analyses, and industry reports for software products, professional services, turnkey systems, processing services, and network services.

Custom Research and Consulting Services satisfy unique needs for services satisfaction studies and other tasks based on INPUT's extensive experience and information resources. Clients gain objectivity and save money by outsourcing to INPUT's independent service.

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CLIENT SUPPORT SERVICES

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On-site Presentation	INPUT consultants present and discuss research findings at your site. Research presentations can be tailored to focus on your needs. Discuss specific interests and issues in confidence. This presentation is an excellent method of distributing key information through the organisation and of obtaining more users of the research materials.
Client Meetings	Meetings, held regularly throughout the year in various European locations, enable you to meet other clients and INPUT's professional staff. Review research projects and discuss market trends and issues. The format of these meetings and their focus on one or two key areas allow in-depth discussion and full client involvement.
Telephone Enquiry Service	Satisfies requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.
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Customer Services Programme—Europe

REPORT DESCRIPTIONS

Professional Services Strategies
This research study profiles the major customer services vendors' professional services portfolios and analyses the competitive strategies being adopted in the marketplace. It also examines the competition from existing professional services companies as customer services organisations move into their markets.

Impact of Downsizing on Customer Services Organisations
The proliferation of personal computers and workstations presents major organisational and logistical support challenges. This study examines the rapidly emerging opportunity for outsourcing these services, which include help-desk support services as well as PC and workstation management.

Open Systems Services
Open systems services assist users in planning, designing and building open systems based on industry-standard interfaces. Many vendors currently offer services that address parts of this life cycle. All vendors suspect that the open systems environment will alter the rules of the game but are uncertain what this future holds for them. INPUT's issue report examines this very basic challenge to the business assumptions on which many service vendors operate, and shows, by means of profiles of typical users and their requirements, how vendors should migrate their offerings from a proprietary operating environment into the more complex environment of the future in which proprietary and open solutions must coexist and find ways of differentiating themselves one from another.

IT Customer Services Market, 1992-1997
Analysis of the European IT customer services market by individual country (see Geographic Scope). Each country market is analysed across INPUT's sector definitions (see Customer Services Market Sectors). Leading vendors in each country are identified.

European Multivendor Maintenance Markets, 1992-1997
This report analyses the customer services remedial maintenance markets according to type of vendor, paying particular attention to total site and split-site contracts. The implications for services and solution marketing strategies are assessed.

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Customer Services Programme—Europe

SCOPE OF SERVICES

CUSTOMER SERVICES MARKET SECTORS

- Computer Systems Maintenance
- Systems Software Support
- Professional Services
- Training and Education
- Environmental Services
- Systems Integration
- Outsourcing
- Network Integration
- Desktop Services
- Disaster Recovery Services
- Business Continuity Services

- Multivendor Maintenance Market
  - Computer Systems Vendors
  - Dealers and Distributors
  - Independent Maintenance Vendors

GEOGRAPHIC SCOPE

Austria	Italy
Belgium	Netherlands
Denmark	Norway
Eastern Europe*	Portugal
Finland	Spain
France	Sweden
Germany	Switzerland
Greece	United Kingdom
Ireland	

* Czechoslovakia, Hungary, Poland.

Customer Services Programme—Europe

REPORT DESCRIPTIONS *(Continued)*

IT Customer Services Satisfaction Analysis
Data are collected by mail and telephone follow-up. These data are aggregated and presented in three systems categories:

- **Large Systems**
- **Midrange Systems**
- **PCs/Workstations**

Key ratings for hardware maintenance, systems software support and total system availability are provided. These ratings are measured for major vendors who supply INPUT with site lists to form interview samples. Measurements are allocated to each vendor according to who owns the principal installed platform. Measurements on other vendors' performance ratings in the same sites allow INPUT to assess multivendor support and maintenance markets under both the equipment and professional services headings.

Research includes interviews at three levels:

- **IS management**
- **Operational management**
- **Desktop end users**

This multilevel research allows clients to compare the attitudes of the IS organisations with their end users, so that trends and issues can be judged more effectively.

INPUT's research is also aimed at understanding the services implications of the trend to open systems. Research targets the increasingly competitive environment that results and highlights the forces pushing new business towards or away from customer services vendors and new market entrants.

Data are also presented on the new markets for customer services vendors in the areas of networking, professional services, systems integration and oursourcing. Areas of overlap between customer services organisations and traditional software and services vendors are analysed.

Customer Services Programme—Europe

REPORT DESCRIPTIONS *(Continued)*

IT Customer Services Trends and Issues
This study analyses the satisfaction of user research data to highlight key trends and issues for customer services executives. The report draws conclusions for vendors from the analysis and provides recommendations to vendors for further development of service opportunities.

Software Support Issues in Customer Services
Customer services vendors need to extend their levels of software support as they widen their portfolio of services. This report examines the issues of providing full software support for both systems and applications software. The report discusses the skill requirements needed, user expectations and the future direction of software support services.

Channel Support Issues in Customer Services
As more and more sales are derived from indirect channels, important issues are raised. One major concern is that VARs, dealers and distributors are selling equipment without necessarily having the expertise to support it. This often results in users becoming isolated from the equipment vendors. This report helps equipment vendors and third-party organisations avoid some of the pitfalls of supporting their users, and recommends strategies for increasing user satisfaction with service.

Environmental Services Opportunities for Customer Services Vendors
Many customer services vendors are broadening their service portfolios, offering services such as structured wiring, air conditioning and power sources. This is creating an important alternative revenue stream. The report defines and sizes the market and discusses the opportunities available. User and vendor issues are analysed.

Independent Maintenance Market
Independent maintenance vendors are still gaining market share, but as service revenues from equipment maintenance decline, they face the challenge of creating alternative, higher-growth revenue streams. This report analyses the market directions for independent maintenance companies. The report profiles leading independent maintenance companies, sizes the market and discusses market penetration trends.

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Customer Services Programme—Europe

Service Update
Monthly publication that tracks events and developments in the customer services industry. It keeps customer services executives up to date with market intelligence on the industry and provides valuable competitive information.

Newsletters already published include articles on:

- *Integrata—A German Company Providing Trading Services*
- *Sphinx-Level V—An Independent U.K. Training Vendor*
- *Nexor + Telub—An Independent Maintenance Acquisition in Scandinavia*
- *Company Announces TRW and GECS as Authorised Independent Maintainers*
- *IBM Announces the Opening of the Software Mall*
- *Learning Tree—An International Training Company*
- *TPME—A Maintenance Consultancy Company*
- *U.S. Trends in Desktop Services*
- *IBM Offers a Wide Range of Services*
- *Granada Update*
- *NCR/AT&T Update*
- *Profile of Intelogic Trace*
- *Unisys Launches Enhanced Network Services*
- *EuroPACE—An Innovative Training Operation*
- *ICL-Bell Atlantic Joint Venture*
- *NCR-AT&T Merger*
- *Novadyne: A New U.S. Independent Maintenance Company*
- *News from the U.S. Enquiry Service*
- *Applied Learning International*
- *Sidestream—A Market-Led Approach to Service from Unisys*
- *Digital—A Focus on Service*
- *Norsk Data—A Study in Radical Change*
- *Sun Microsystems—Life After Hardware Maintenance?*
- *DEC Announces Subsidiary in Eastern Europe*
- *Safetynet—A Disaster Recovery Specialist*
- *Thomainfor Revisited*

Customer Services Programme—Europe

RESEARCH BULLETINS

Research Bulletins are frequent, short reports that:

1. Present results from research studies as quickly as possible. These Research Bulletins communicate key findings on issues, trends, new developments and ideas, market forecasts and vendor analysis.
2. Provide INPUT's analyses of important industry announcements, events, awards and other activities. These Research Bulletins analyse the meaning of these activities rather than just give the news.

Research Bulletins already published that are provided immediately include:

- *Regaining Business Lost to Independent Maintainers—The Equipment Vendor Challenge*
- *Full Support—The Key to Network Customer Services*
- *The Success of Independent Maintenance in Western Europe*
- *Independent Maintenance Vendors Face Wider Service Challenge*
- *Systems Operations—A High-Growth Opportunity for Customer Services Vendors*
- *Disaster Recovery Services—Missed Opportunity for Equipment Vendors*
- *New Service Markets—The Key to Declining Equipment Maintenance Revenue Growth*
- *User Search for Cost Reduction Could Force Maintenance Prices Lower*
- *Close to Inflation-Level Price Increases Offer Best Compromise for Customer Services Vendors*
- *Equipment Vendors Entrench to Protect Customer Service Revenues*
- *Declining Growth of Customer Services Market Levels Off*
- *Growth of Non-Maintenance Service Revenues Is Critical to Western European Customer Services Vendors*
- *More Favorable Market Growth Prospects for Customer Services Vendors*
- *Systems Software Support—A Key Customer Services Opportunity*
- *Users Express Concern with Systems Software Support*
- *Impact of ICL-Nokia Acquisition on Western European Customer Services*
- *ICL/Bell Atlantic Joint Venture and a Profile of the Company That Formed the Basis for the Joint Venture*
- *Computer Users Register Significant Improvements in Satisfaction with Vendors' Large Systems Service*
- *Impact of Recession on Professional Services Rates in the U.K.*

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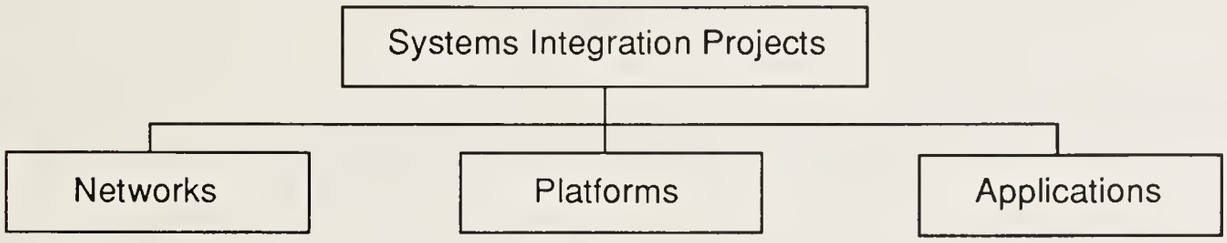

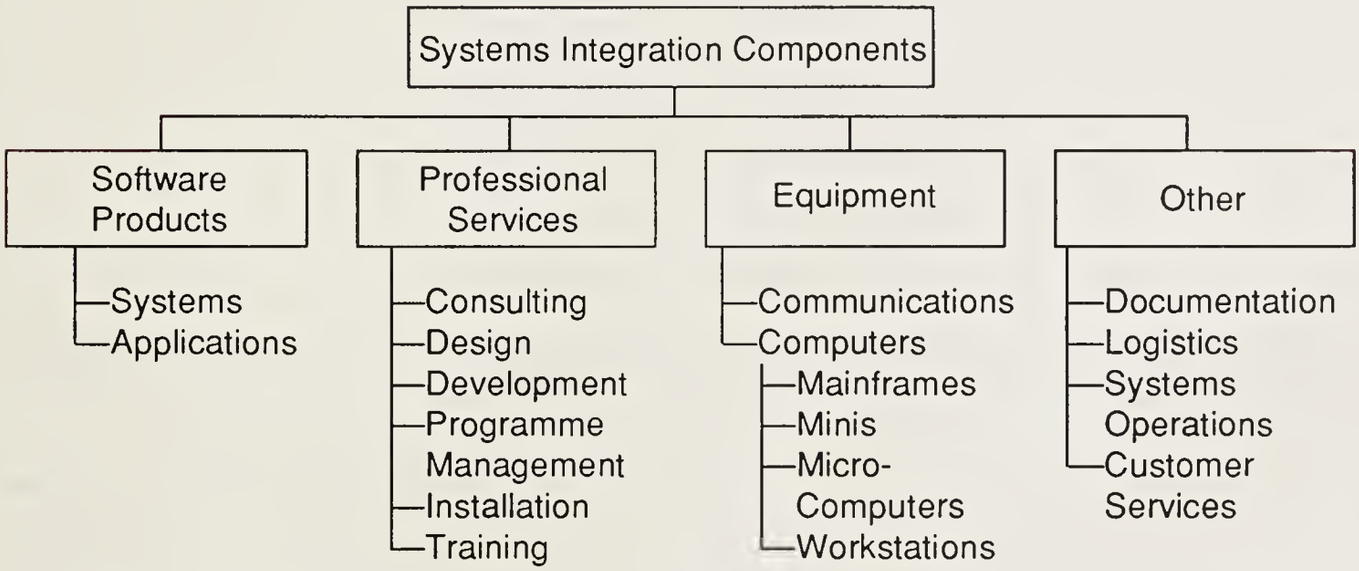

Market and industry research and consultancy service supporting the business intelligence, marketing, and planning functions of organisations involved in systems integration.

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Systems Integration Programme—Europe

SUMMARY

Market research and consultancy service supporting the business intelligence, marketing and planning functions of organisations involved in systems integration (SI).

Reports

Impact of Downsizing on Systems Integration

Systems Integration Opportunities in Re-engineering

Methods for Successful Systems Integration Projects

Systems Integration Markets, 1992-1997

Systems Integration Vendor Analysis

Marketing Issues in Systems Integration

Imaging Systems Integration Markets

European Systems Integration—Vendor Issues

Research Bulletins

Regular reports on INPUT research findings and analysis of important industry announcements, trends, and issues.

SERVICES

Telephone Enquiry

Use the "hotline" to obtain answers to your immediate questions.

Access to INPUT Consultants

Obtain opinions and advice from INPUT executives and consultants from meetings, mail, fax, and the telephone.

On-Site Visit

Discuss your issues and concerns, introduce experts to your organisation, and obtain presentations on industry trends.

Client Meetings

Attend focused reviews of market trends. Discuss issues with other clients and INPUT's professional staff.

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Systems Integration Programme—Europe

BACKGROUND AND BENEFITS

During the second half of the 1980s systems integration(SI) emerged as one of the fastest growing markets for information systems and services. Today the economic recession and the revolutionary trends of downsizing, networking and outsourcing are creating a more difficult and challenging environment for systems integration.

Executives, planners and marketing staff need intelligence and data on the changes, opportunities and threats in this rapidly changing environment.

The **Systems Integration Programme** builds on INPUT's 17 years of analysing the professional services and systems integration industry. It provides insights on the reasons for and against systems integration; emphasises buyer values, competitive offerings, and contract characteristics; and tracks market trends.

This programme predicts the changes that affect your business.

Market Intelligence	Keep on top of SI market changes. Plan ahead so that you are not surprised. Base your plans on realistic, detailed forecasts.
Competitive Strategy	Plan positioning, strategy and tactics based on knowledge of key vendor activities. Plan distribution channel and partnering strategy. Identify potential providers of SI for specific opportunities.
Opportunity Identification	Identify user requirements and "hot" market issues. Make informed decisions. Avoid wasted time and energy: focus on the real needs.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.

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Systems Integration Programme—Europe

PROGRAMME DESCRIPTION

The **Systems Integration Programme** forecasts the SI market for the next five years. It analyses trends, issues, competition and opportunities in the rapidly changing SI market in each country (see Scope of Services).

Systems integration is the provision of a complete solution to a complex information systems, networking or automation requirement through custom selection and implementation of a variety of information systems products and services. A systems integrator is responsible for the management of a systems integration contract and is the main point of contact and responsibility to the buyer for the delivery of the specified system on schedule and in budget.

The programme tracks contracts to determine trends and validate market projections. It examines and forecasts the following market components:

- **Computer and communications equipment**
- **Software products**
- **Professional services**
- **Other products and services (e.g., operations support)**

Research covers communications network SI (market sizes exclude voice-only networks), platform SI (primarily technical projects where there is minimal applications software development), applications SI (where the prime focus is on the applications software), and desktop, office or departmental SI (where the projects are primarily carried out at the end-user level).

RELATED PROGRAMMES AND SERVICES

Systems Integration Program—U.S.

Outsourcing Information Systems Programmes (U.S. and Europe) provide research on the revolution in systems operations, network operations, applications management and desktop services opportunities.

Information Services Market Analysis Programmes (U.S. and Europe) provide market forecasts, trend analysis and vertical industry reports for software products, professional services, systems integration, turnkey systems, systems operations, processing and network services.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

Systems Integration Programme—Europe

REPORT DESCRIPTIONS

Impact of Downsizing on Systems Integration
There are several forms of downsizing. This report analyses the impact of each of them on the SI market. It forecasts the market size and growth for the next five years. The nature of downsizing projects in terms of size and scope are examined together with user requirements, which are often different from IS-driven projects.

Systems Integration Opportunities in Re-engineering
This project analyses the particular opportunities that occur when buyers use systems integration as part of organisational re-engineering. The 1990s will be a time of major transformation for all organisations as they adapt to changing markets, global competition and new financial and management structures. The transformation (re-engineering) process usually requires a new information systems infrastructure. This process will provide huge opportunities for vendors capable of extending their service offerings to handle user needs. The nature of these extended requirements is examined in this report as well as the buyer motivations.

Methods for Successful Systems Integration Projects
This report describes methods and processes used to manage successful systems integration projects. Examples of problems encountered and ways of overcoming them are presented. The research examines particularly the issues of risk reduction and management from the perspectives of vendors and buyers.

Systems Integration Markets, 1992-1997
Examines demand and market forces in Europe for systems integration. For each country market, the report estimates the market size, forecasts market growth and identifies the leading vendors. The impact of the economy and its development is projected.

Systems Integration Vendor Analysis
Provides profiles that describe and analyse the systems integration services of significant vendors; information is provided on their organisation, capabilities, strategies, market focus and alliances. This report gives market shares of leading vendors and compares their positions, capabilities, strategies and tactics. It also discusses how vendors are forming alliances to gain the necessary expertise to bid successfully. Vendor profiles include:

- Cap Gemini Sogeti
- Andersen Consulting
- IBM
- SNI
- BT
- Groupe Bull
- DEC
- ICL
- Debis Systemhaus

Systems Integration Programme—Europe

REPORT DESCRIPTIONS *(continued)*

Marketing Issues in Systems Integration
Examines the systems integration market from a user's viewpoint, to enable companies operating in systems integration markets to better understand client requirements. The report investigates the major issues in industry markets that are leading users towards systems integration contracts, and examines user issues and concerns about selecting a vendor.

Imaging Systems Integration Markets
Examines opportunities in this exciting, emerging technology. Now that pictures, photographs and film can be stored electronically, a plethora of opportunities is arising for integrating such technology into users' information systems. Computerised personnel records can contain photographs and banks can store copies of checks. This report sizes the market for imaging systems and identifies leading vendors active in the market, providing valuable competitive information for companies involved in, or considering entering, the market.

European Systems Integration—Vendor Issues
This report examines the European systems integration market from a vendor point of view, identifying and commenting on the major challenges that face systems integration vendors. Major systems integration projects are few in number and competition for them is intense. This report discusses vendor strategies in targeting the systems integration market and the strengths and weaknesses of the major categories of vendors.

Systems Integration Programme—Europe

SCOPE OF SERVICES

SYSTEMS INTEGRATION SECTORS

- Computer and communication equipment
- Software Products
- Professional Services
- Other products and services

GEOGRAPHIC SCOPE

Austria	Italy
Belgium	Netherlands
Denmark	Norway
Eastern Europe*	Portugal
Finland	Spain
France	Sweden
Germany	Switzerland
Greece	United Kingdom
Ireland	

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Systems Integration Programme—Europe

RESEARCH BULLETINS

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2. Provide INPUT's analyses of important industry announcements, events, awards, and other activities. These Research Bulletins analyse the meaning of these activities rather than just give the news.

Research Bulletins already published that are provided immediately include:

- *Systems Integration Market Forecasts*
- *Client/Vendor Relationship in Systems Integration*
- *User Skill Deficiencies Remain Most Important Driving Force for Systems Integration*
- *Groupe Bull Systems Integration Strategy*
- *Competition for Key Partners Leads to Long-Term Alliances and "Locking Out" of Competitors*
- *Account Managers Are the Key Personnel for Developing Systems Integration Contracts*
- *Sharing Project Models Steers Users to Low-Risk Options*
- *Industry-Specific Business Experience—A Critical Success Factor in Systems Integration*
- *Management Consultancies Typically Act as "Consulting Engineers," Not "Prime Contractors"*
- *Profile of ICL Service Systems*
- *Profile of Unisys' Complex Systems Organisation*

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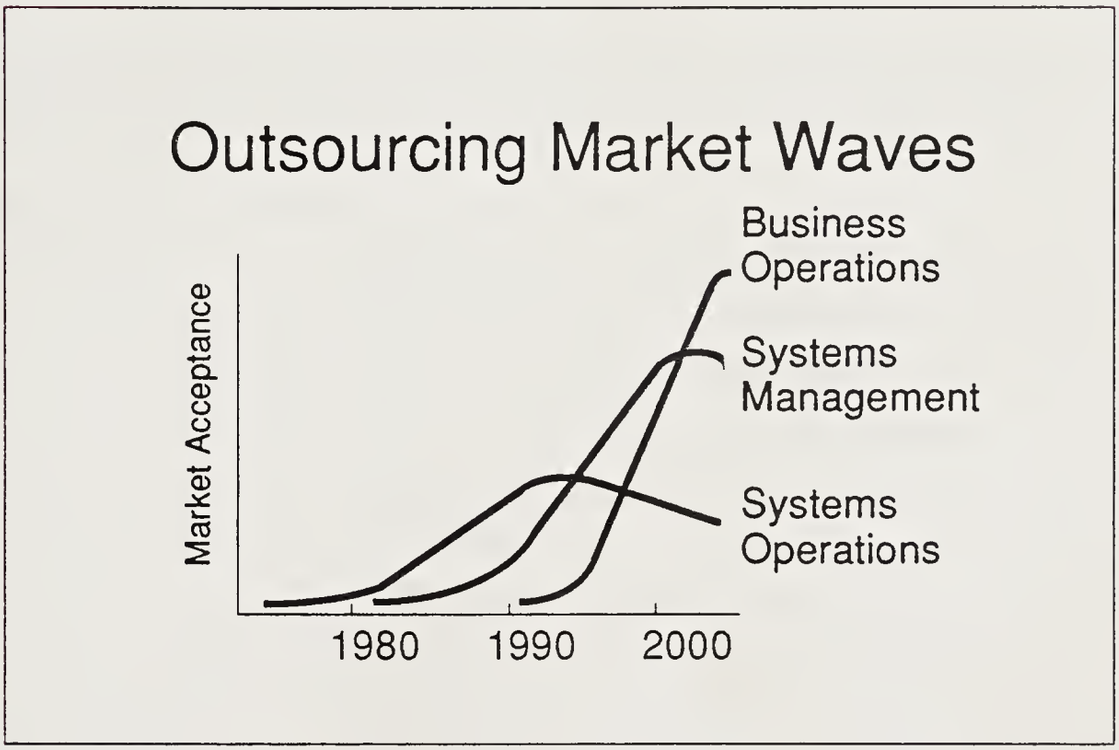

Analyses the outsourcing information systems revolution in the 1990s.

- **Systems Operations**
- **Network Operations**
- **Desktop Services**
- **Applications Development**
- **Applications Management**
- **Education and Training**

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Outsourcing Information Systems Programme—Europe

—*The Potential $30 Billion Market*—

SUMMARY

Analyses the information systems (IS) outsourcing revolution and opportunities in the 1990s. In-depth research covers the outsourcing of systems operations, applications development and maintenance, network operations, and desktop services. Builds on INPUT's 15 years' experience of analysing the outsourcing phenomenon.

REPORTS

Outsourcing Systems Operations

Outsourcing Network Management and Operations

Outsourcing Desktop Services

Outsourcing Applications Management

Information Systems Outsourcing Market Opportunities, 1992-1997

Information Systems Outsourcing Competitive Analysis

Marketing Issues in Systems Operations

Research Bulletins

Regular reports on INPUT research findings and analysis of important industry announcements, trends, and issues.

SERVICES

Telephone Enquiry

Use the "hotline" to obtain answers to your immediate questions.

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Client Meetings

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Outsourcing Information Systems Programme—Europe

BACKGROUND AND BENEFITS

A revolution is in the making in the 1990s. Increasingly vendors are taking responsibility for managing and operating information systems processes or functions.

The **Outsourcing Information Systems Programme** builds on INPUT's 15 years of analysing the outsourcing phenomenon. It provides insights on the reasons for and against outsourcing; emphasises buyer values, competitive offerings, and contract characteristics; and tracks market trends.

Because outsourcing represents a shift in the method of contracting for existing operations rather than the creation of new operations, change can occur very rapidly. As a result, this revolution will have a dramatic impact on users and vendors. This programme predicts these changes and resulting opportunities.

Keep on Top of this Revolutionary Market	Revolution means dramatic, non-linear change. This is happening in outsourcing. This programme enables you to keep on top of, and indeed to predict, such changes.
Competitive Strategy	Identify what key vendors are doing in this market. Plan distribution channel strategy and competitive positioning. Identify potential, suitable providers of outsourcing services.
Opportunity Identification	Identify user requirements and "hot" market issues. Make informed decisions. Avoid wasted time and energy: focus on the real needs.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary outsourcing vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.

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Outsourcing Information Systems Programme—Europe

PROGRAMME DESCRIPTION

This programme analyses trends, issues, competition and opportunities in the rapidly expanding outsourcing markets in each European country (see Scope of Services).

Outsourcing of information systems is the contracting of all or a major part of an information systems process to an external vendor on a long-term (greater than one year) basis. The vendor takes responsibility for the performance of the process.

An extension of information systems outsourcing is the contracting of the business function itself, which embeds the information systems process. There are already examples of these market opportunities.

The programme researches buyers and vendors in each country market in Europe. The different types of outsourcing have different buyers. The research examines the roles of each of the buyer categories including IS management, other functional managers and senior executives.

Market sizes and growth rates are provided through 1997 for each country and vertical industry market.

Leading vendors and major market segments are analysed and described. Their strategies and competitive positions are presented.

RELATED INPUT PROGRAMMES

U.S. Outsourcing Information Systems Program

Systems Integration Programmes (U.S. and Europe) analyse opportunities for vendor-provided solutions to complex information systems, communications, and automation requirements.

Information Services Market Analysis Programmes (U.S. and Europe) provide forecasts, trend analyses, and industry reports for software products, professional services, turnkey systems, processing services, and network services.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

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Outsourcing Information Systems Programme—Europe

CLIENT SUPPORT SERVICES

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REPORT DESCRIPTIONS

Outsourcing Systems Operations
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Outsourcing Information Systems Programme—Europe

REPORT DESCRIPTIONS *(Continued)*

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OUTSOURCING MARKET SECTORS

- Systems Operations
  - Platform
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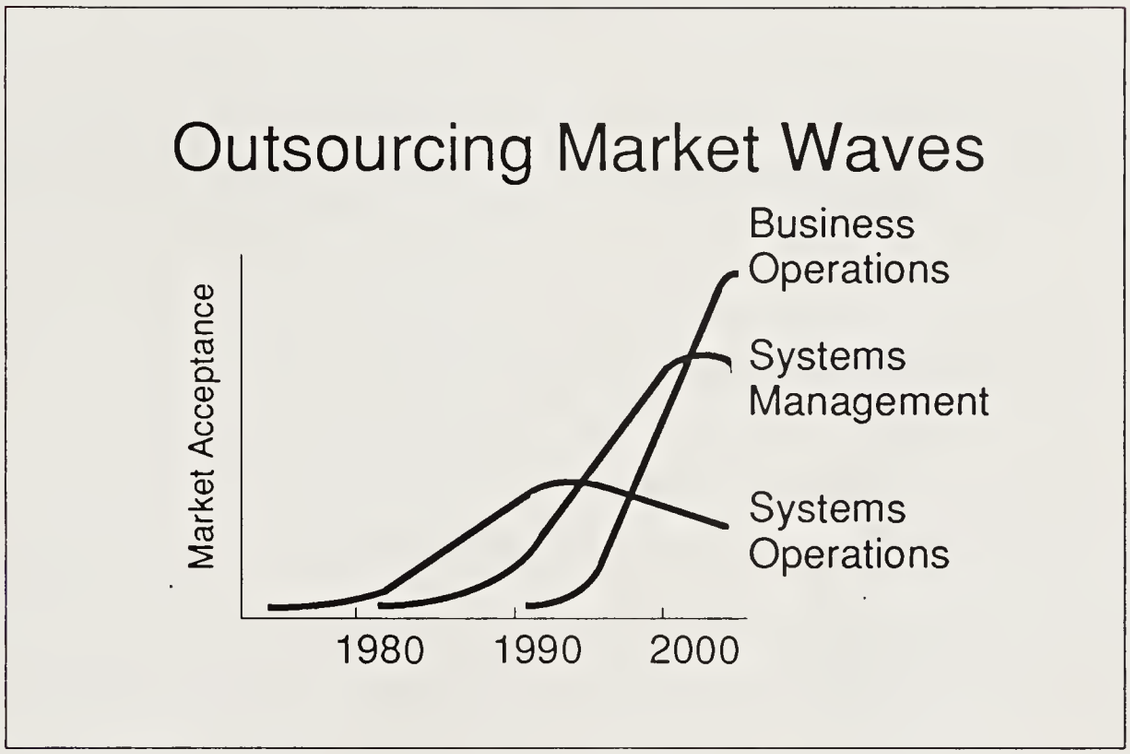

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—*The Potential $30 Billion Market*—

SUMMARY

Analyses the information systems (IS) outsourcing revolution and opportunities in the 1990s. In-depth research covers the outsourcing of systems operations, application development and maintenance, network operations, and desktop services. Builds on INPUT's 15 years' experience of analysing the outsourcing phenomenon.

Reports

Outsourcing Systems Operations

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Outsourcing Information Systems Programme—Europe

PROGRAMME DESCRIPTION

This programme analyses trends, issues, competition and opportunities in the rapidly expanding outsourcing markets in each European country (see Scope of Services).

Outsourcing of information systems is the contracting of all or a major part of an information systems process to an external vendor on a long-term (greater than one year) basis. The vendor takes responsibility for the performance of the process.

An extension of information systems outsourcing is the contracting of the business function itself, which embeds the information systems process. There are already examples of these market opportunities.

The programme researches buyers and vendors in each country market in Europe. The different types of outsourcing have different buyers. The research examines the roles of each of the buyer categories including IS management, other functional managers and senior executives.

Market sizes and growth rates are provided through 1997 for each country and vertical industry market.

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RELATED INPUT PROGRAMMES

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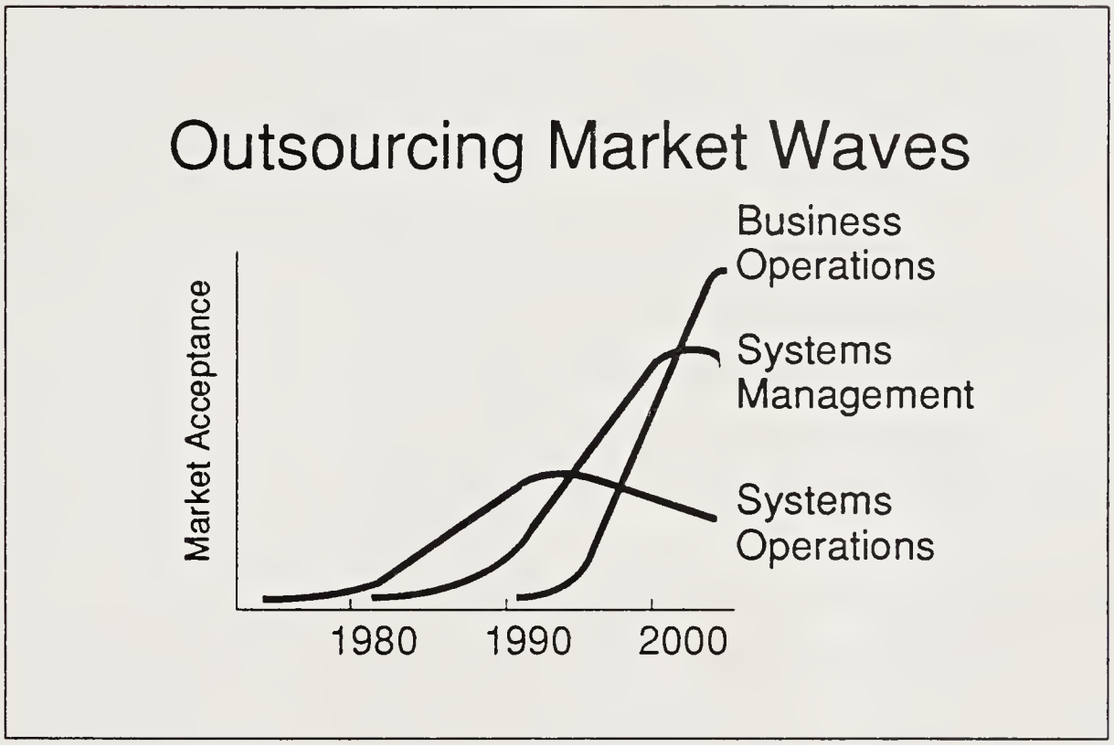

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What motivates users to outsource their desktop services?

INPUT, as part of an ongoing programme of research into outsourcing markets, answers this crucial question and many others in its latest report:

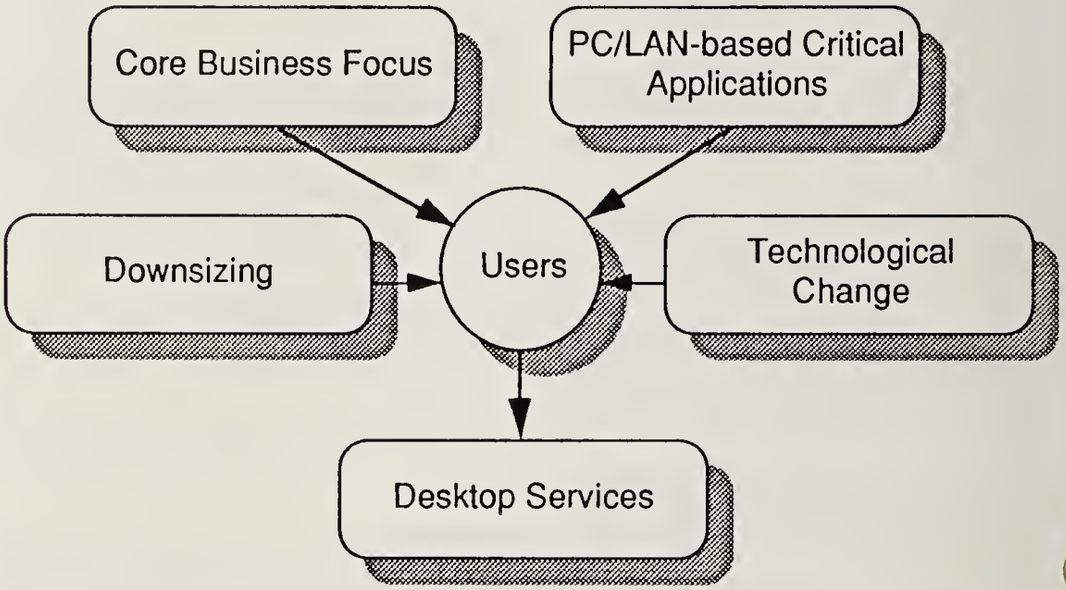
Outsourcing Desktop Services

Increase your chances of success in winning outsourcing contracts with expertise from INPUT

If you are involved in winning outsourcing contracts, you need the answers to:

- Which vendor types do users prefer?
- Why do users decide to outsource their desktop services to an external vendor?
- How satisfied are users with the level of service they receive?
- Who decides to outsource?
- Who are the leading vendors active in the market?
- How do vendors organise to sell desktop services?

Driving Forces
Desktop Services, Europe



INPUT's assessment of the desktop services market includes an analysis of the driving and inhibiting forces, so that you can better understand the direction the market is likely to take.

Desktop Services—A Major Market Opportunity

With increasing numbers of desktop-based PCs in use within organisations, contracts for providing a service portfolio directly to end users represents an important market opportunity. Gain competitive advantage by being among the first to benefit from INPUT's assessment of the market.

Desktop Services Defined

The market for desktop services is new. As with all emerging markets, clarification and definitions are needed. INPUT's report provides a clear definition of the market, and provides a forecast for future growth in Europe, covering the period 1992-1997. Separate forecasts are provided for the major markets of France, the U.K., Germany and Italy, and also for Scandinavia, Netherlands and Belgium. This report provides vendors with a clear picture of the direction the market is taking; it identifies the main service components and assesses the relative profitability of each.

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INPUT provides clients with objective analysis and insightful opinions on outsourcing desktop services in Europe

About INPUT's report, Outsourcing Desktop Services...

Please send me the report for £1,500

My payment method is...

- ☐ Purchase order number _____
- ☐ Cheque enclosed
- ☐ Please invoice my company

- ☐ *I'd like to see more. Please send me the report abstract and table of contents.*
- ☐ *I have questions about how the conclusions pertain to my business. Please ask the author to contact me.*

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My responsibilities extend beyond Europe. Send me information on...

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☐ *INPUT's Worldwide Information Services Market Forecast, 1991-1996 of 30+ countries*

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Benefits of this report

- Maximise your outsourcing service revenues by identifying
  - Which industry sectors you should target
  - How users select a vendor
  - Who makes the decision to outsource
  - The role of alliances between vendors

Use this report to help you understand how you should compete profitably in this new market.

Know Your Competition

Knowing who your competitors are and what their strategies are is a difficult and time-consuming task. INPUT can help you keep up to date with your competitors by identifying the leading vendors active in the European desktop services market. INPUT also identifies some of the major contracts that have been awarded, and their value. The report identifies the four types of vendor active in the market and examines the strengths and weaknesses of each type, so that you can position your company against your competition. Four of the leading vendors are profiled in the report, allowing you to better understand their strategies.

Know What Users Need

The more you know about users' requirements, the better you are able to satisfy them. It is also important to know how users view different types of vendors and how users choose the vendor they perceive is best suited to the job. INPUT's report discusses users' motivations for outsourcing their desktop services and identifies who the decision makers are likely to be.

Why You Need This Report

- Deciding how to react to a new market is a complex task.
- Should your company enter the market?
- Will you need to reorganise?
- Who are your competitors and what are their strategies?

INPUT has over 10 years of experience in tracking the latest developments in information services markets, and is well-positioned to advise vendors on their market strategies.

Call, fax, or mail

your order

to your nearest

INPUT office

About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in Europe, North America, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

Since 1974, INPUT has compiled the most extensive research base available on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and on the impact of downsizing.

Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/ proprietary research, subscription-based continuous advisory programs, merger/ acquisition analysis and satsifaction surveys.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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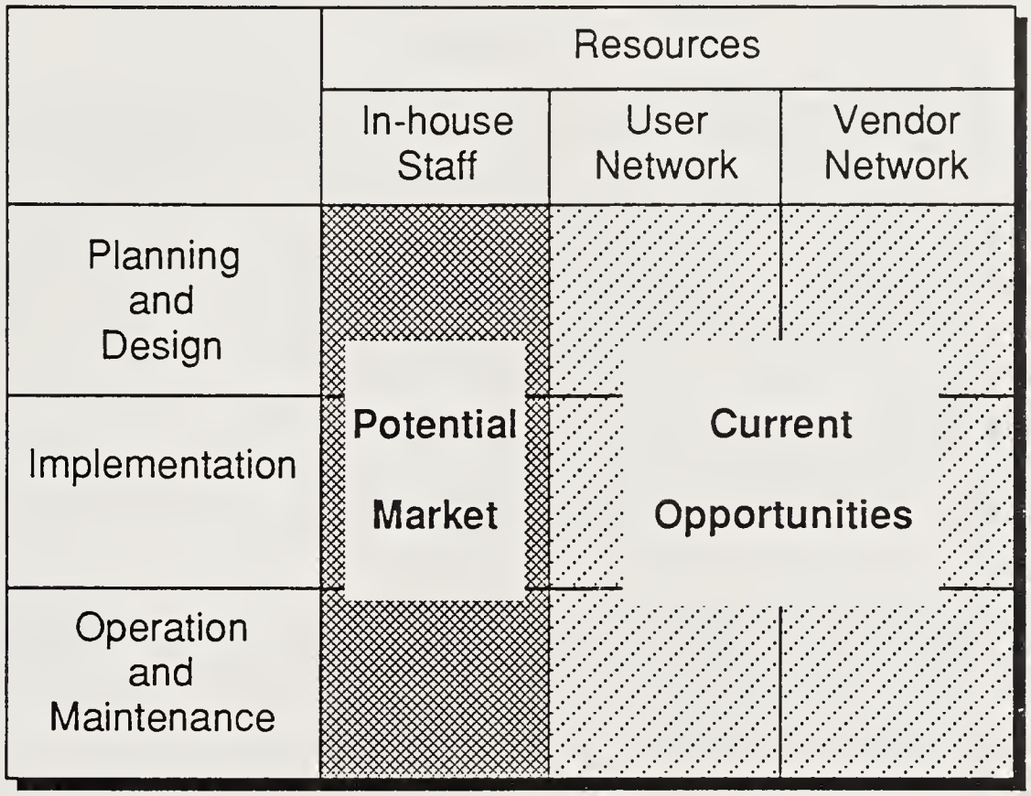

Market and industry research focused on the rapidly developing opportunities for advanced network management services in Europe.

- **Traditional Services**
  - **Managed Network Services**
  - **Messaging Services**
  - **Electronic Commerce**
  - **Electronic Information Services**

- **New Services—Market Opportunities**
  - **Network Integration**
  - **Network Design**
  - **Network Strategy Studies**
  - **Help Desk Services**
  - **Network Outsourcing**
  - **Network Operations**

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Network Management Services Programme—Europe

SUMMARY

A programme of market and industry research focused on the rapidly developing opportunity for advanced network management services in Europe.

REPORTS

Network Services Competitive Analysis

Network Services Market Analysis

Major Corporate Network Management Requirements

Network Services Customer Satisfaction

End User Network Services

Research Bulletins

Regular reports on INPUT research findings and analysis of important industry announcements, trends and issues.

SERVICES

Telephone Enquiry

Use the "hotline" to obtain answers to your immediate questions.

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Attend focused reviews of market trends. Discuss issues with other clients and INPUT's professional staff.

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BACKGROUND and BENEFITS

Communication network technology advances and cost/performance improvements have driven the demand for new intelligent network services at a fast rate. Networking could have a potentially revolutionary impact on the application of information systems in business, commerce, government and utilities during the 1990s. However, investment requirements, de-regulation and liberalisation effects and most recently the impact of economic recession have created an intensely competitive and difficult environment for network services vendors.

To meet this challenge there is an increasing need for more market intelligence insights on competitive vendor activity and more knowledge and understanding of user organisation's network services requirements.

INPUT's **Network Management Services Programme** has been designed to meet the needs of executives and professional marketing staff as they face these intensifying marketing challenges.

Market Intelligence	Networking could have a potentially revolutionary impact on the application of information systems. Benefit from INPUT's in-depth knowledge of network services markets to keep ahead of developments.
Competitive Strategy	Plan strategy and tactics based on knowledge of key vendor activities. Find out who the new entrants to the market are and where they are positioned.
Opportunities	Identify user requirements and "hot" market issues. Make informed decisions. Avoid wasted time and energy: focus on the real needs.
Consulting Support	Build a professional support relationship with INPUT's experienced consultants. Test marketing ideas, strategies and tactics. Obtain market and vendor insights.
Networking	Develop working relationships with complementary vendors through client conferences and INPUT staff.
Marketing	Promote your company's capabilities and interests through INPUT's worldwide client and contact network.

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PROGRAMME DESCRIPTION

The **Network Management Services Programme** forecasts the size of the market for the next five years. It analyses trends, issues, the competitive environment and new opportunities in this rapidly changing and complex environment.

INPUT defines the network management services sector to include:

- Management of complete networks
- Provision of services to support network applications
- Provision of services based on using vendor- and/or user-owned networks

INPUT's research of users and vendors of network services provides:

- Market size and growth rates for 1992-1997 for network services
- Analysis of user needs and user satisfaction
- Discussion of key trends and new opportunities
- Competitive analysis—including new market entrants

RELATED INPUT PROGRAMMES

Information Services Industry Programmes (U.S. and Europe) provide market forecasts, trend analysis and vertical industry reports for software products, professional services, systems integration, turnkey systems, systems operations, processing and network services.

EDI and Electronic Commerce Programme (U.S.) examines the marketing, competitive and economic issues of the movement from paper to electronic-based commerce.

Systems Integration Programmes (U.S. and Europe) analyse opportunities for vendor-provided solutions to complex information systems, communications and automation requirements.

Outsourcing Information Systems Programmes (U.S. and Europe) analyse trends, issues, competition and opportunities in the rapidly expanding outsourcing markets.

Customer Services Programme (Europe) analyses the trends, issues, competition and opportunities in diverse systems maintenance markets.

Custom Research and Consulting Services satisfy unique needs for market research, competitive analysis, IS strategy development, acquisition support and other tasks based on INPUT's extensive experience and information resources.

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CLIENT SUPPORT SERVICES

Clients gain maximum benefit from the industry research and consulting services available to them through the development of a strong, continuous relationship with INPUT staff. Through frequent contact and sharing of opinions and ideas, you receive a flexible response to changing areas of interest and focus. INPUT provides the following specific services in order to build a full relationship:

Consultant Access — Continuous support from INPUT's consultants and executives who are available to share opinions and reactions to events, and to discuss ideas and challenges.

On-site Presentation — INPUT consultants present and discuss research findings at your site. Research presentations can be tailored to focus on your needs. Discuss specific interests and issues in confidence. This presentation is an excellent method of distributing key information through the organisation and of obtaining more users of the research materials.

Client Meetings — Meetings, held regularly throughout the year in various European locations, enable you to meet other clients and INPUT's professional staff. Review research projects and discuss market trends and issues. The format of these meetings and their focus on one or two key areas allow in-depth discussion and full client involvement.

Telephone Enquiry Service — Satisfies requirements for short-term research needs (less than two hours), and clarification/amplification of report and presentation data.

Site Subscriptions — Complete programme services to additional sites at substantially reduced fees.

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REPORT DESCRIPTIONS

Network Services Competitive Analysis
Vendor profiles describe and analyse the full range of network services provided by the most significant organisations active in the market. Background company data and information concerning these organisations and other related information services that they provide is also included.

Network Services Market Analysis
The network services market analysis and five year forecast study covers the whole of Europe with the major country markets analysed on an individual basis—the full list of countries covered is listed in the table *Geographic Scope*. The market is analysed into the separately defined sectors listed in the table *Network Management Service Sectors*.

Major Corporate Network Management Requirements
This study addresses the requirements for outsourcing major wide area communication network services. Case studies of major user organisation service implementations serve to support an understanding of users' needs and future plans.

Network Services Customer Satisfaction
This study, based on extensive user research in the major economies of Western Europe, examines user satisfaction with existing network services and the vendors that supply and support them, and also covers new requirements relating to service product and support shortfalls. The study is intended to provide a comprehensive picture of user opinions and needs across a wide cross-section of organisations.

End User Network Services
This study specifically addresses the opportunity inherent in the rapid evolution of widely dispersed PCs and workstations connected together by both local- and wide-area networks. Service opportunities examined include help desk support services as well as PC and workstation management. INPUT's 1992 research study examines user needs matched against competitive vendor offerings to form an assessment of available opportunities.

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SCOPE OF SERVICES

NETWORK MANAGEMENT SERVICE SECTORS

- Managed Network Services
- Messaging Services
- Electronic Commerce
- Other Value-Added Network Services

GEOGRAPHIC SCOPE

Austria	Italy
Belgium	Netherlands
Denmark	Norway
Eastern Europe	Portugal
Finland	Spain
France	Sweden
Germany	Switzerland
Greece	United Kingdom
Ireland	

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RESEARCH BULLETINS

Research Bulletins are frequent, short reports that:

1. Present results from research studies as quickly as possible. These Research Bulletins communicate key findings on issues, trends, new developments and ideas, market forecasts and vendor analysis.
2. Provide INPUT's analyses of important industry announcements, events, awards and other activities. These Research Bulletins analyse the meaning of these activities rather than just give the news.

Research Bulletins already published that are provided immediately include:

- *Comprehensive and Coherent Network Services—The Vendor Opportunity*
- *The Basic Network and ISDN—The Challenge of a New Infrastructure*
- *The Impact of New Trunking Technologies on Network Services and Applications*
- *The Impact of Satellite Technology on Network Services*
- *The Impact of Mobile Communications*
- *Developments in Cordless Telephony*

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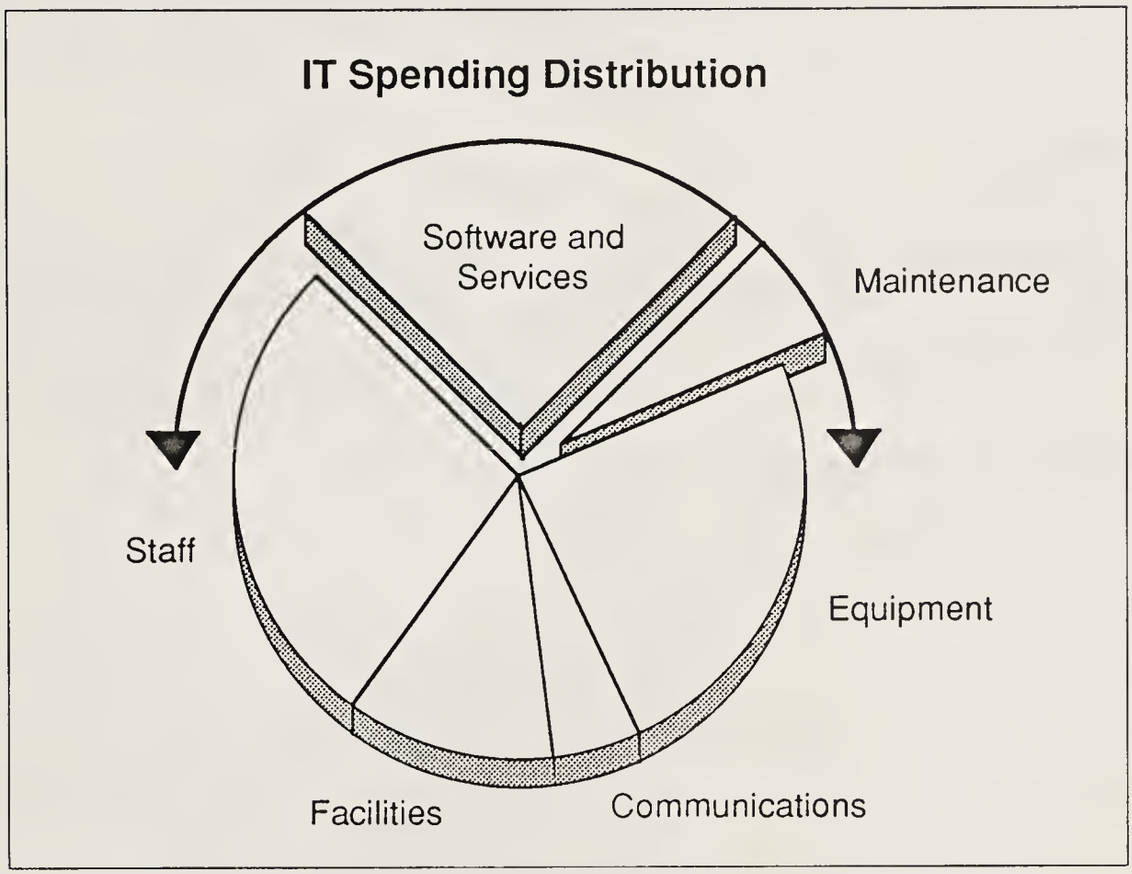

Analyses the fast-changing market for computer and communications software and services in the 1990s.

- **Analysis of Customer Needs**
- **Market Size and Growth by**
  - **Industry**
  - **Cross-Industry**
  - **Product/Service**
- **Competitive Information**
  - **Leading Vendor Profiles**
  - **Market Positioning**
  - **Strategies**
- **Impacts of**
  - **Downsizing**
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Analyses the rapid changes in user spending on software and services and the new business opportunities for the industry in the 1990s. In-depth research covers 17 countries and key industry sector markets.

REPORTS

Information Services Market Sourcebook	Complete analysis, forecasts, and commentary on the software and services market for each of 17 countries.
Forecast Database	Detailed forecasts in local currencies, dollars and ECU showing market sizes for every subsector.
Industry Sector Reports	*National Governments* *Transportation* *Insurance* *Banking and Finance* *Discrete Manufacturing* *Process Manufacturing* *Retail & Wholesale Distribution*
Issue Reports	*IT Spending Patterns—Europe, 1992-1997* *Software Re-engineering in Europe* *IT Services—Growth or Decline?*
Vendor Reports	Profiles of leading software and services vendors.
Research Bulletins	Regular reports on INPUT research findings and analysis of important industry announcements, trends and issues.

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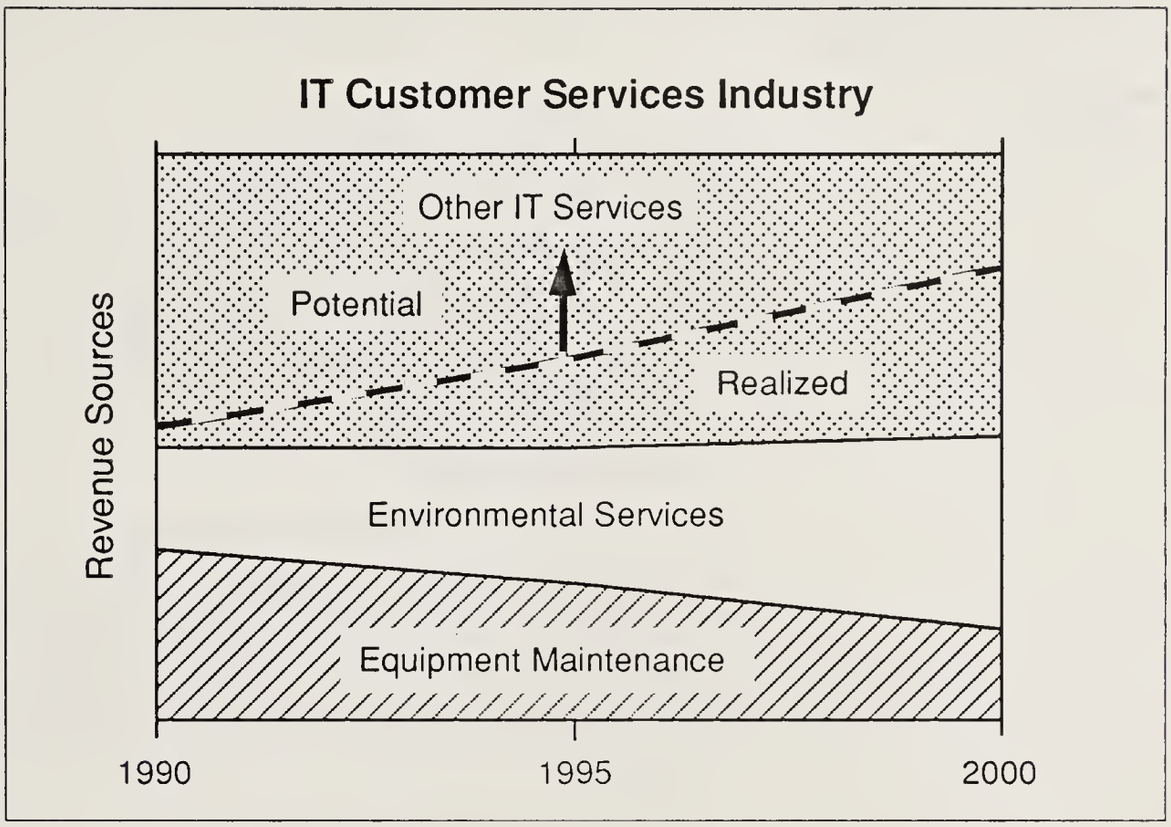

Market research and consultancy service for IT customer services organisations

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  - Equipment Maintenance
  - System Software Support
  - Education and Training

- New Services—Market Opportunities
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  - Network Integration
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Professional Services Strategies

Impact of Downsizing on Customer Services Organisations

Open Systems Services

IT Customer Services Market, 1992-1997

IT Customer Services Satisfaction Analysis
- *Large Systems*
- *Midrange Systems*
- *PCs/Workstations*

IT Customer Services Trends and Issues

European Multivendor Maintenance Markets, 1992-1997

*Software Support Issues in Customer Services**

*Channel Support Issues in Customer Services**

*Environmental Services Opportunities for Customer Services Vendors**

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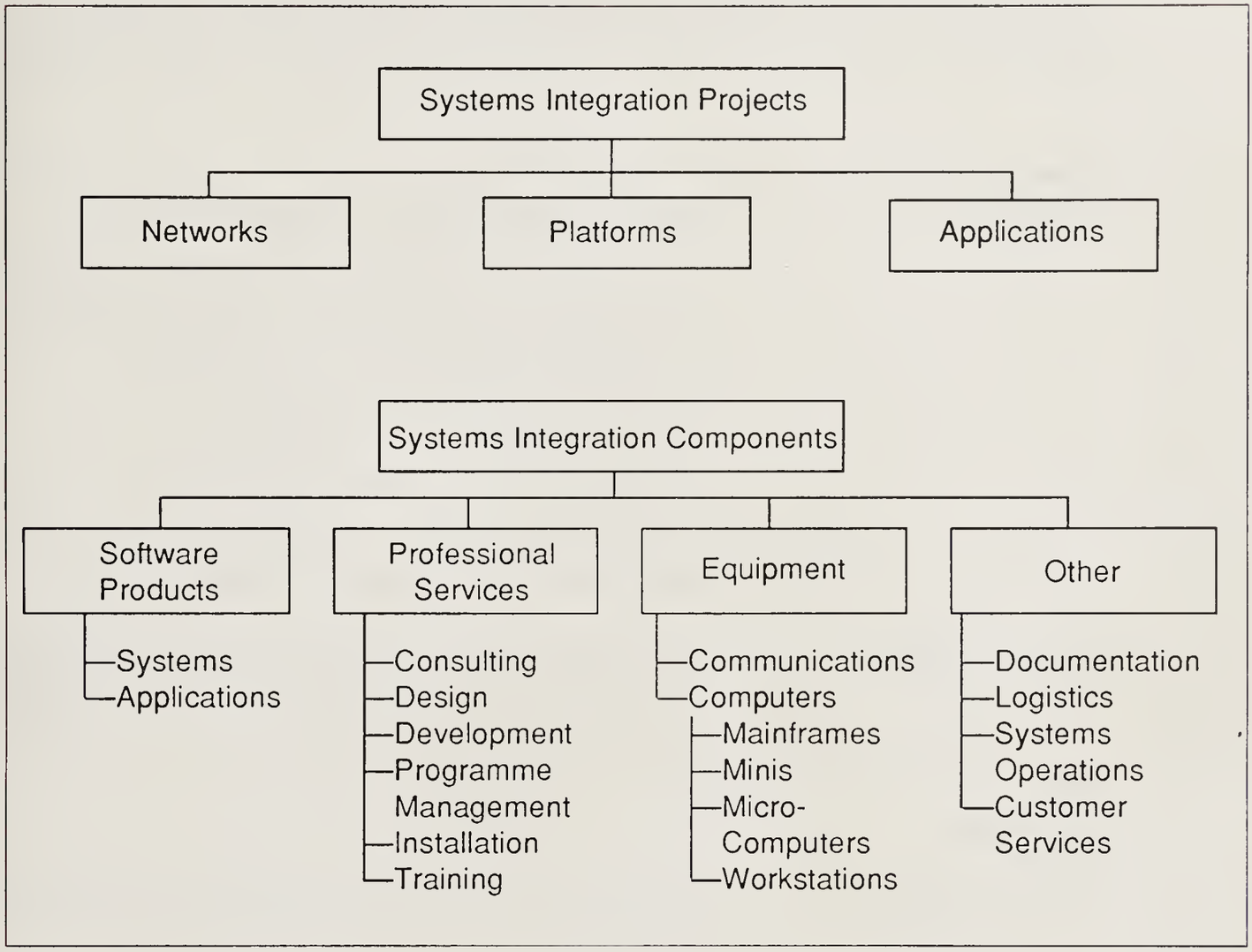

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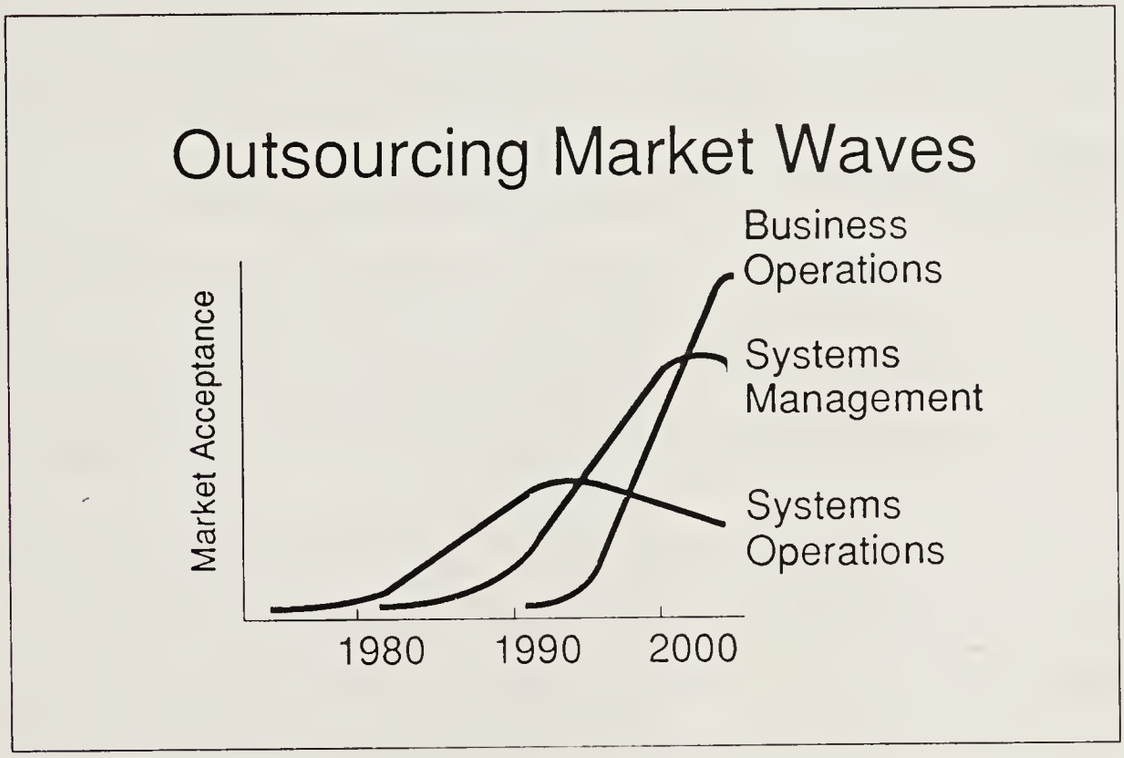

Analyses the outsourcing information systems revolution in the 1990s.

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- Network Operations
- Desktop Services
- Applications Development
- Applications Management
- Education and Training

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Outsourcing Information Systems Programme—Europe

—*The Potential $30 Billion Market*—

Analyses the information systems (IS) outsourcing revolution and opportunities in the 1990s. In-depth research covers the outsourcing of systems operations, applications development and maintenance, network operations, and desktop services. Builds on INPUT's 15 years' experience of analysing the outsourcing phenomenon.

REPORTS	*Outsourcing Systems Operations*
	Outsourcing Network Management and Operations
	Outsourcing Desktop Services
	Outsourcing Applications Management
	Information Systems Outsourcing Market Opportunities, 1992-1997
	Information Systems Outsourcing Competitive Analysis
	Marketing Issues in Systems Operations
Research Bulletins	Regular reports on INPUT research findings and analysis of important industry announcements, trends, and issues.

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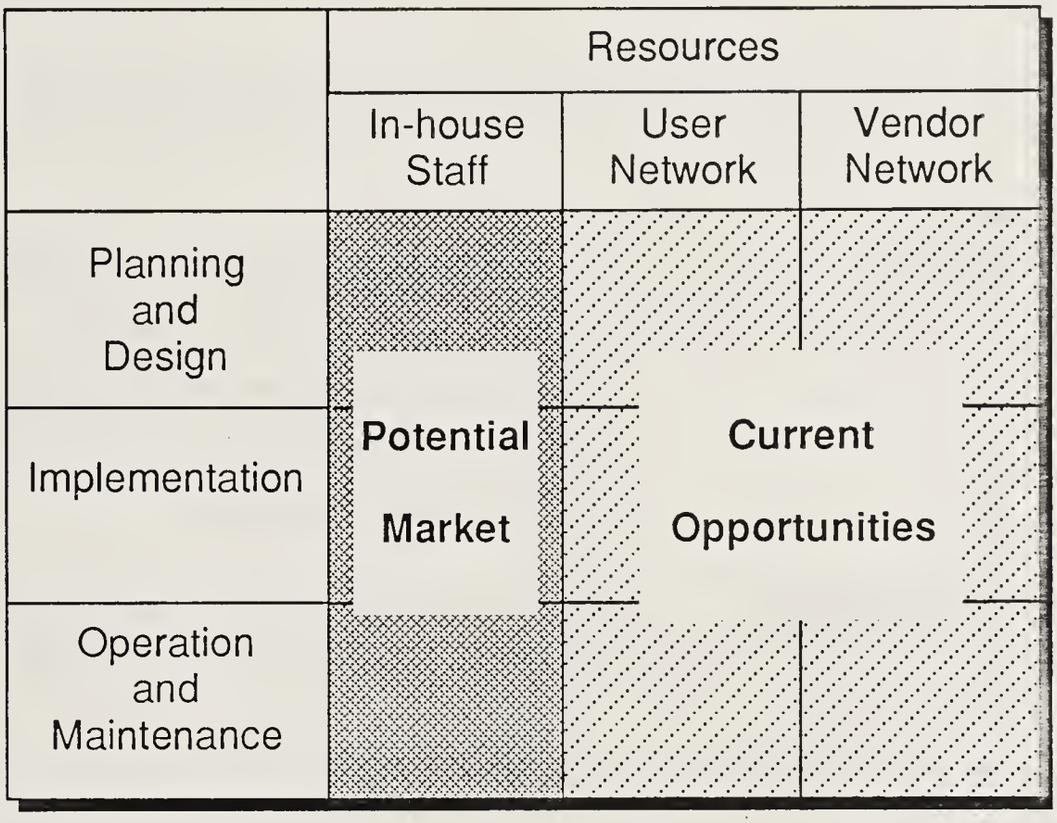

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  - Network Operations

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Discuss issues and concerns, introduce experts to your organisation, and obtain presentations on industry trends.

Client Meetings

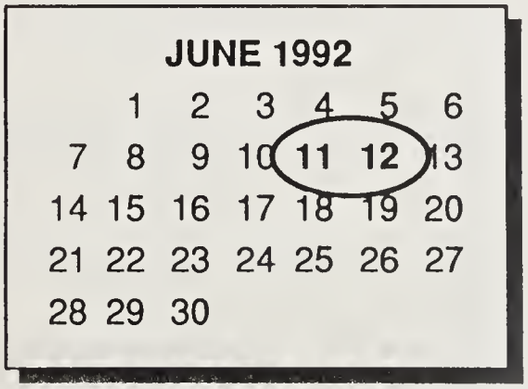
Attend focused reviews of market trends. Discuss issues with other clients and INPUT's professional staff.

INPUT®

1992 Federal Information Technology Conference

Federal IT Market: Prospects and Progress

- Discover how to maximize your effectiveness in the federal information technology market
- Hear the views of senior federal officials on upcoming agency needs
- Learn about market size and growth expectations—and how the new budget priorities are affecting federal spending



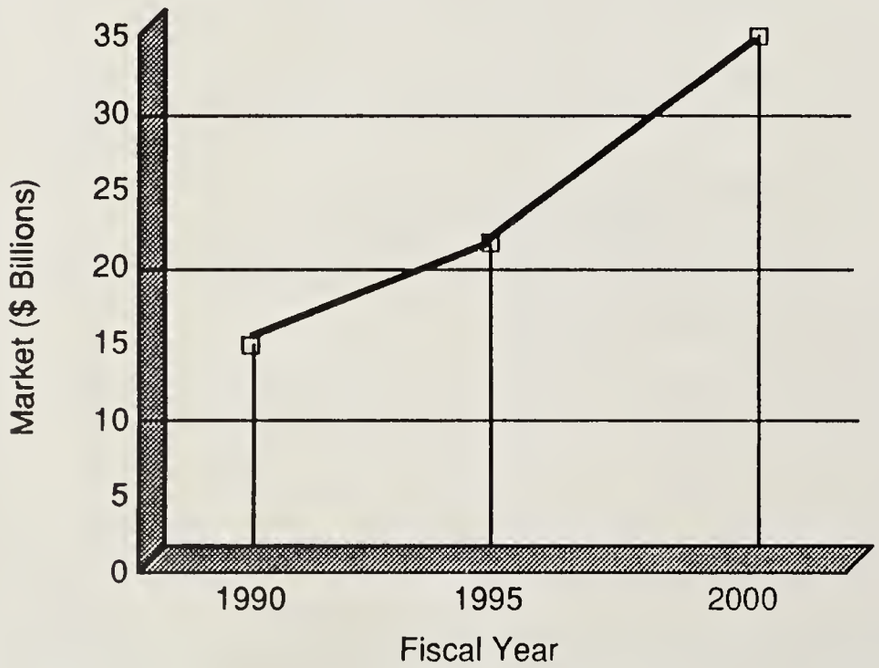
INPUT's 1992 Federal Information Technology Conference

Federal IT Market: Prospects and Progress

This is the time for reassessing your prospects in the federal marketplace over the next five years. There are a lot of changes taking place as DoD restructuring progresses and the still growing IT budget shifts to civilian agencies. New technologies promise to deliver more power and flexibility to the users through downsizing, outsourcing, and re-engineering.

As a vendor determined to take advantage of what is happening in the federal marketplace, you can benefit from the insight that agency representatives, vendor executives, and the INPUT research staff bring to this conference.

Federal Information Technology Market



THURSDAY—JUNE 11

- **Federal IT Market Forecast, 1992-1997**

  John Frank, Vice President, INPUT

- **The 8(a) Program from Both Sides (panel)**

  Charles Hall, President, PSI, Inc.

  IBM

- **High Performance Computing Potential**

  NIST

- **The CIM Initiative Continues**

  Dennis Brown, Director, CIM Operations Center, DoD—CIM

- **Downsizing in the Federal Market**

  Peter Cunningham, President, INPUT

- **Outsourcing Federal IT Requirements**

  NASA

- **Fast Track Procurement Can Work**

  TBA

FRIDAY—JUNE 12

- **DoD Software Reuse and Simplification Program**

  Dr. Kurt Fischer, Deputy Director, Information Technology, DoD—DDI

- **Federal Market Dialogue**

  J.P. Richard, Vice President, INPUT

- **Federal Procurement Regulations—Their Impact**

  Walt O'Neil, Special Assistant, Federal Policy, IBM

REGISTRATION FORM

INPUT®

YES! Sign Me Up! I need to learn the latest about what's happening—and how to succeed—in the federal information services market. I will attend INPUT's 1992 Federal Information Technology Market Conference—*Federal IT Market: Prospects and Progress* June 11 & 12, 1992, Tyson's Corner Marriott, Vienna, Virginia.

☐ Yes, I am registering for this conference. There will be _____ attendees from my company. I understand that I will be billed $795 for each of the first 2 attendees and $295 for any attendees thereafter.

☐ Yes, I am registering for this conference. There will be _____ attendees from my company. I am a subscriber to INPUT's Federal Program and can send 2 attendees at no charge.

☐ Please have an INPUT representative call me.

Company _____

Name _____

Title _____

Address _____

City _____ State _____ Zip _____

Phone _____

Signature (required for all orders) _____

Cancellations must be received in writing and are subject to a $50 cancellation fee. There are no refunds for cancellations received after June 5, 1992. INPUT considers purchase order numbers, company checks, or American Express as proper reservations. Payment must be received prior to conference. INPUT reserves the right to make changes to this conference without notice.

HOTEL RESERVATIONS:
Call the Tyson's Corner Marriott, (703) 734-3200, and ask for the INPUT Conference rate.

TERMS OF PAYMENT—
Payment in full is due prior to conference.

☐ Enclosed is my check in the amount of $ _____ to cover the cost of my registration.

☐ Please invoice my company on purchase order number _____ in the amount of $ _____.

☐ Charge it to my American Express number: _____

exp. date _____ /_____ /_____

Don't miss these upcoming INPUT 1992 Conferences

SYSTEMS INTEGRATION PROGRAM CONFERENCE
Fairview Park Marriott, Falls Church, Virginia July 21 and 22

OUTSOURCING INFORMATION SYSTEMS PROGRAM CONFERENCE
(formerly Systems Operations Program)
Ritz-Carlton Hotel, McLean, Virginia September 17 and 18

1992 U.S. EXECUTIVE CONFERENCE
Fairmont Hotel, San Francisco, California October 4, 5, and 6

For more information, call Barbara Fisher, Conference Coordinator, at (703) 847-6870. If you are not a client, take advantage of an early registration discount of 10% by registering 30 days prior to the event.

Call, fax, or mail your order to your nearest INPUT office

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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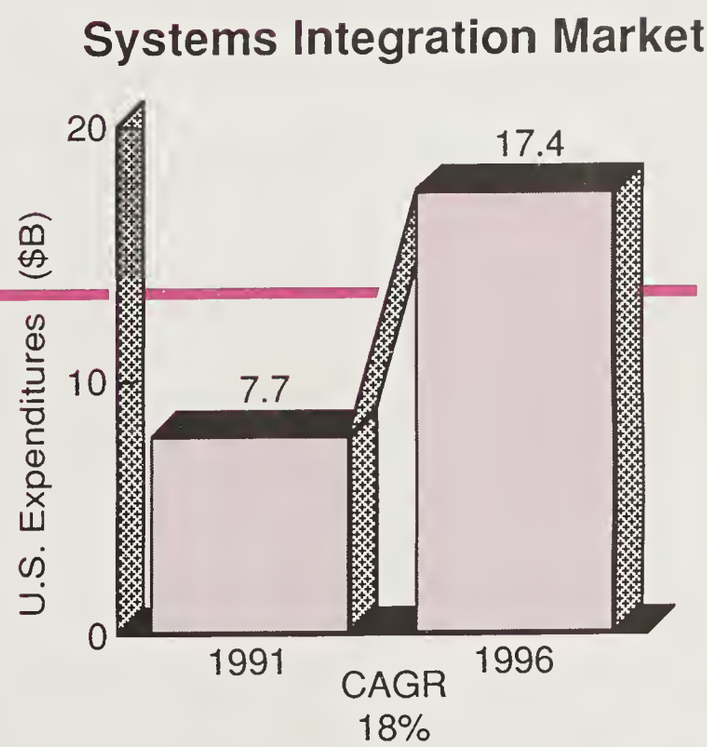
Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 3864-0531
Fax (03) 3864-4114

INPUT®

1992 Systems Integration Conference

Fairview Park Marriott, Falls Church, Virginia
July 21 & 22, 1992

A Time To Re-Evaluate The Opportunities



INPUT's fifth annual systems integration conference is for vendors who cannot afford to have anything but the best in market intelligence and informed analysis of the systems integration market.

REGISTER TODAY

PRELIMINARY AGENDA

Tuesday, July 21, 1992

8:45 - 9:30 **The 1992-1997 Systems Integration Market** — Competing successfully in the SI market requires knowledge of its size, growth rates and key market segments. INPUT presents an authoritative, comprehensive analysis providing the basis of business plans in the SI market.

9:30 - 10:00 **Federal Vertical Market** — Case study

10:30 - 11:30 **Growth Opportunities in System Integration: Business Process Re-engineering** — This high-growth SI application area offers substantial new business potential. Position your company to take advantage of it and learn the key factors necessary for success.

11:30 - 12:00 **State Vertical Market** — Case study

12:00 - 1:00 *Lunch*

1:00 - 2:00 **Successful Systems Integration Project Management** — SI project management directly impacts two success measurements: profit and client relationship. INPUT studied this issue in depth and offers an analysis of the critical success factors. Use this session to evaluate your current practices and to develop new strategies to strengthen your project management.

2:00 - 2:30 **Discrete Manufacturing Vertical Market** — Case study

3:00 - 4:00 **Contract Issues in Systems Integration** — Learn the key elements of a successful commercial SI contract from a leading industry authority.

4:00 - 4:30 **Retail Vertical Market** — Case study

4:30 - 5:00 Attendee contribution session

5:00 - 7:00 *Reception* —Network with your peers in the SI business.

Wednesday, July 22, 1992

9:00 - 10:00 **Network Integration** — Network integration has become a larger and more complex element of the systems integration process. This panel discussion will feature leading network systems integration companies that will discuss their "real world" experiences.

10:00 - 10:30 **Process Manufacturing Vertical Market** — Case study

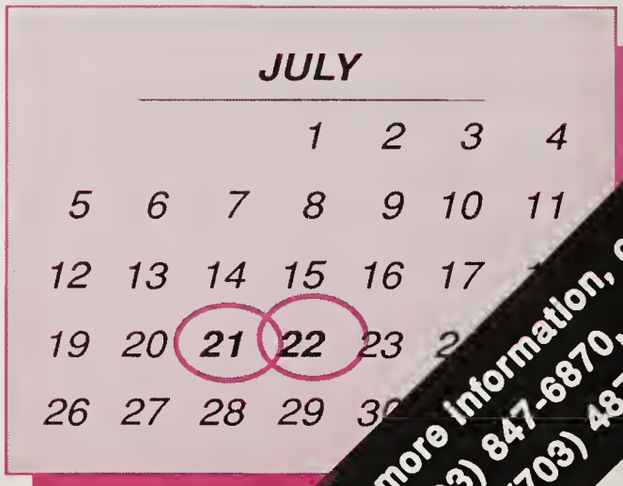
11:00 - 12:00 **Systems Integration Opportunities in Outsourcing** — Get the edge on your competition and learn from INPUT how systems integration programs can lead to successful outsourcing contracts.

12:00 - 12:30 **Banking Vertical Market** — Case study

12:30 - 1:00 **Wrap-up and critique**

1:00 - 2:00 *Lunch*

2:00 INPUT consultants will be available by appointment for individual discussions of SI topics.



To register, or for more information, call Barbara Fisher at (703) 847-6870, or fax the enclosed form to (703) 487-6872.

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1992
SYSTEMS
INTEGRATION
CONFERENCE

Fairview Park Marriott,
Falls Church, Virginia

July 21 & 22, 1992

Please check one of the following:

- ☐ Yes, register me for this important conference
- ☐ I would like more information. Please contact me.
- ☐ Also, please send me *additional* information on INPUT's Systems Integration Program

Attendance Fees:

- **SI Program Clients:** Two free attendees; $295.00 for each additional attendee
- **Clients of other INPUT programs:** $295.00 each
- **Non-clients:** $795.00 for first attendee; $545.00 for each additional attendee

Method of payment (payment must be received prior to conference):

- ☐ Purchase order number _____
- ☐ Check enclosed
- ☐ American Express number _____ Exp. _____

Signature _____

My responsibilities have changed. Please send future information to:

Name _____ Address _____

Title _____ City _____

Company _____ State _____ Zip _____

Phone _____ Fax _____

Please duplicate this form for additional attendees and return forms together.
Cancellations are subject to a $50.00 cancellation fee. No refunds made after July 14, 1992.
INPUT reserves the right to make changes to this conference without notice.

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Key Benefits

- Expand your opportunities in the SI market
- Learn why corporations and government agencies are turning to SI
- Receive the latest data on the size, growth rates, and five-year projections in the SI market
- Identify SI market trends and driving issues
- Learn how your SI contracts can generate successful outsourcing relationships

Who Should Attend

- Marketing and operations executives of SI firms
- SI planning and business development management
- Information services firms thinking of entering the SI market
- Executives of firms considering buying SI services
- Computer equipment providers
- Professional services and business process consulting firms
- Processing services firms

Conference Registration

Please complete the enclosed registration/inquiry form and fax it to any INPUT office or contact Barbara Fisher, Conference Coordinator, at (703) 847-6870.

Accommodations

The Fairview Park Marriott, located at 3111 Fairview Park Drive, Falls Church, Virginia, offers the finest amenities and accommodations. A special room rate for INPUT Systems Integration Conference attendees is available: $89.00 single or double.

Please make your reservations directly with the hotel. Call (703) 849-9400; ask for the INPUT group rate. Room space can only be guaranteed until July 6, 1992, so book early!

Other INPUT Conferences

OUTSOURCING INFORMATION SYSTEMS PROGRAM CONFERENCE— *(Formerly Systems Operations Program)*— Ritz-Carlton Hotel, McLean, Virginia September 17 & 18, 1992.

U.S. EXECUTIVE CONFERENCE— Fairmont Hotel, San Francisco, California, October 4, 5, & 6, 1992.

About INPUT

INPUT is a worldwide consulting and market research firm uniquely focused on the information technology services and software markets. Executives in many technically advanced companies in North America, Europe, and Japan rely on INPUT for data, objective analysis, and insightful opinions to support their business plans, market assessments, and technology directions. By leveraging INPUT's considerable knowledge and expertise, clients make informed decisions more quickly, and benefit by saving on the cost of internal research.

Since 1974, INPUT has compiled the most extensive research base available on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and on the impact of downsizing.

Consulting services are provided by more than 50 professionals in major international business centers. Clients retain INPUT for custom consulting/ proprietary research, subscription-based continuous advisory programs, merger/ acquisition analysis and detailed studies of U.S. federal government IT procurements.

Most clients have retained INPUT continuously for a number of years, providing testimony to INPUT's consistent delivery of high-value solutions to complex business problems. To find out how your company can leverage INPUT's market knowledge and experience to gain a competitive edge, call us today.

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75016 Paris, France
Tel. (1) 46 47 65 65
Fax (1) 46 47 69 50

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W-6306 Langgöns-Niederkleen,
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Tel. 0 6447-7229 Fax 0 6447-7327

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U.S. Information Services Professional Services Program— 1992

INPUT's premier research service provides an in-depth analysis and forecast of the U.S. information services professional services market.

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORT

U.S. Professional Services Market, 1992-1997—This report analyzes the U.S. professional services market from 1992 through 1997. Data include user expenditure forecasts, vendor rankings, and merger and acquisition activity. The professional services market is segmented into three submodes: consulting, software development, and education and training. Each submode is analyzed and forecasted. This report presents the issues, trends, and key events affecting the professional services market and identifies new and emerging strategies and opportunities.

TREND ANALYSIS/TECHNOLOGY IMPLEMENTATION REPORTS

Professional Services - Pricing Strategies—An analysis of the current pricing practices within the U.S. professional services sector. Guidelines for vendors on pricing types of service offerings and type of professional staff from various sizes and types of professional services firms.

Professional Services—Analysis of Services Offerings —An assessment of the offerings provided by professional services firms on both a strategic and tactical level. A framework for defining offerings is provided and a subclassification of the current submodes (consulting, software development, and education and training) are included. Emphasis is also provided on the newer areas of application management and applications maintenance. The framework would includes systems integration and the evolving outsourcing aspects of professional services.

Professional Services—The Role of Alliances—Using analysis of individual companies and their use of alliances, the professional services industry is reviewed to determine the role, benefits and negatives, and overall impacts of the use of alliances.

Re-engineering and Transition Management—An examination of two new areas of the consulting services submode of professional services. Both re-engineering and transition management have received significant discussion and should provide the basis for an insightful analysis of ways in which IT professional services firms are impacting their clients on a broad basis.

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U.S. Information Services Professional Services Program— 1992

RESEARCH BULLETINS
Concise summations of research in progress, breaking industry trends, and changes in the market.

SERVICES

Telephone Inquiry	"Hotline" for short ad hoc research needs on the U.S. professional services market. Sixteen hours of hotline service each year.
Consultant Access	Ongoing interaction with INPUT's senior research staff.
On-Site Visits	Senior INPUT staff member presents research results at client's site (travel expenses additional).
Industry or Client Conference	Two seats at INPUT's annual assessment of the industry. Additional seats at two-thirds off the list price.
Information Center Access	Client may visit and use INPUT's research library.

U.S. Information Services Professional Services Program is available from INPUT, 1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees also available upon request from INPUT's offices in New York (201) 801-0050 or Washington, D.C. (703) 847-6870.

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U.S. Information Services Professional Services Program

Please enter my order as described:

Subscription to INPUT's U.S. Information Services Professional Services Program at the fee of $11,000.

Travel expenses for on-site presentations are additional and will be billed separately.
California Clients: Please add applicable sales tax on 25% of purchase price.

TERM OF SUBSCRIPTION—The initial term of this subscription will be for twelve (12) consecutive months beginning _____. The subscription will automatically renew for each succeeding year unless INPUT receives written notice sixty (60) days prior to the start of each renewal period. The fees for INPUT services defined in this Agreement and its attachments will be invoiced each year at INPUT fees then in effect, due and payable on or before the start of the program subscription period.

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CONDITIONS AGREEMENT—The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

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Signature

Name

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Date

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Effective Applications Development Program—1992

The program provides extensive analysis and recommendations for improving the applications development process, based on primary research and a comprehensive data base.

WRITTEN ELEMENTS:

Reports	Applications development success factors, applications development trends and requirements, organizational readiness for CASE, the need for vendor-supplied CASE-related services.
User Profiles	Analyses of the experience of selected organizations using applications development tools and methodologies.
Vendor Profiles	Profiles of companies active in the applications development market, including CASE companies and other software product vendors as well as systems integrators and professional services firms.
Index and Cross-References	Subscribers will receive a diskette that will allow them to look up topics and key words for all published materials in the program.
Research Bulletins	Frequent summaries of research projects, analyses of events and opinions on issues from experts.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants through meetings, mail, and telephone.
On-Site Visits	Discuss your issues and concerns, introduce experts to your organization and obtain presentations on industry trends.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.

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Effective Applications Development Program—1992

BACKGROUND

For the first time in a generation there may be potential for broad improvements in the applications development process. The attention being given to CASE environments underlines this opportunity. INPUT's research to date has identified a critical need for further fact-based analysis and action-oriented recommendations for improving the effectiveness of applications development. This need is addressed by a new INPUT service, the *Effective Applications Development Program.*

THE SCOPE OF THE SERVICE

This is a research-based service building on INPUT's extensive research base among vendors and users. The source of the research will be continuing, in-depth analyses of the applications development experience.

The results will focus on a key question: How can the barriers to applications development effectiveness be lowered? Take advantage of INPUT's findings—and the experiences of others; this will increase the probability of achieving success.

DELIVERABLES

The service delivers its information and recommendations by means of written reports and services.

WRITTEN ELEMENTS

Standard materials will contain significant amounts of quantified data that has been statistically analyzed. The written deliverables will include extensive analysis as well as pertinent recommendations.

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Applications Development Success Factors—This report series will use primary research to examine the factors leading to success and/or failure in applications development and in improving the process. Factors to be considered will include:

- Tool quality and integration
- The planning process
- Methodology
- Hardware and software platforms
- Vendor support
- Corporate management involvement; IS management strategies
- IS work group composition
- Training
- Applications characteristics

INPUT will provide recommendations, for users and vendors, on how to maximize the probability of success.

Applications Development Trends and Requirements—The data from INPUT's user panel will be used to show overall trends and requirements. Topics covered include:

- Stages of applications development; progression from one stage to another
- Current and planned types and levels of CASE-related resources
- Current and planned personnel skill requirements (actual versus available)
- Applications development software and systems
  - Current/planned
  - Satisfaction levels
  - Sources
- Relationship between tools and methodologies
- Current and planned training
  - Types
  - Gaps
  - Sources
- Contrast of user and vendor expectations
- Analysis of variations by industry, company size, and corporate culture

INPUT will forecast growth rates of tools and methodologies use and related markets for 1992-1997 and will analyze factors affecting growth.

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Organizational Readiness for CASE—INPUT's research shows that 80% of organizations identify the "soft" issues (e.g., methodology, knowledge, training, organization/culture) as being major impediments to implementing or gaining significant benefits from CASE. INPUT refers to these as "organizational readiness" issues. Those that will be assessed include:

- Corporate culture factors and impact on:
  - CASE choices
  - Planning
  - Organization
  - User relationships
  - Application selection
- Development methodology
  - Current practice/impact
  - Plans
  - Relationship to CASE
- Measurement
  - Philosophy/practice
  - Impact on CASE
  - Relation to quality
- Planning environment
  - Corporate commitment and success
  - IS planning

All these factors represent "best" practices; however, it may be infeasible or wasteful to maximize each one of these factors. INPUT's research will quantify the relative importance of these factors (and others that are identified in the course of the research) as well as indicating where there are diminishing returns in going beyond the good to achieve the best.

The Need for Vendor-Supplied CASE-Related Services—Professional services firms and systems integrators are offering a wide range of CASE-related services. To what extent will or should these be used by corporate customers, and what kind of services will be most useful? This report will answer the following questions:

- What are the reasons for turning to an outside service vendor?
- What types of services are used now? Will this change in the future?
- What has been the experience and satisfaction so far in using outside services?
- What are the strengths and weaknesses of using vendor-supplied services (as perceived by both vendors and users)?
- Are enterprises establishing enterprise-wide CASE standards to which all vendors must conform?

Effective Applications Development Program—1992

- How large a proportion of IS budgets are being spent on applications development-related services? What is this likely to be in the future?
- What types of vendors are looked on most favorably to provide these services?

These results will be quantified wherever possible (e.g., dollars, growth rates, preference ratings, etc.). INPUT will provide additional analysis and recommendations.

Applications Development User Profiles—These profiles will be a series of analyses of the experiences of selected organizations using applications development tools and methodologies including CASE. Material will be presented in a standard format that includes:

- The planning and R&D process
- Projected/actual qualitative and quantitative benefits (quality, productivity, elapsed time, etc.)
- Methodology: Current, planned
- Tool selection and experience
- Costs, by category (CASE products, training, and hardware)
- Extent of tool use: past, present, and future
- How interactions with other parts of the organization have changed as a result of changes in applications development processes
- Impact of AD/Cycle and other products
- Identification and analysis of lessons learned

User profiles will represent organizations at different levels of achievement and will be categorized by enterprise size, industry, and type of organization. Particular attention will be focused on selecting companies that have achieved success.

Vendor Profiles—Companies active in the applications development market will be profiled. Vendors will not be limited to CASE product vendors, but will include:

- Other systems software product companies (e.g., DBMS, 4GL) - Information provided will include their plans to respond to CASE and other changes in the applications development environment.
- Applications software products vendors - Information provided will include the expected impact on their products and services of changes in the applications development environment.

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Effective Applications Development Program—1992

- Professional services firms - Information will be provided on their expectation of the impact of changes in applications development tools and methodologies and the types of applications development services they expect to provide to information systems and user organizations.

- Systems Integrators - Profiles will show how systems integrators expect to use applications development tools and methodologies to develop business solutions.

Information will be presented in a standard format and will include:

- Applications development-related product and service descriptions, existing and planned
- Size of CASE-related business
- CASE function specialties (e.g., design, implementation, re-engineering)
- Industry knowledge templates
- Partners and partnership strategies
- AD/Cycle strategy and implementation
- Largest and typical implementations
- CASE strategy and, if applicable, linkage to other business strategies

This information can be used to identify industry and competitive trends, to establish partnerships, and for potential customers to identify vendors.

INDEX AND CROSS-REFERENCES
Subscribers will receive a diskette that will allow them to look up topics and key words for all published materials in the program.

RESEARCH BULLETINS
Issued periodically, these will describe developments and announcements, and provide analysis of a time-sensitive nature.

Written materials will be issued in loose-leaf form. Research and analysis will be continuously delivered to subscribers as particular topics are completed.

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Effective Applications Development Program—1992

SERVICE ELEMENTS

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants through meetings, mail, and telephone access. (Note: Each client site will have 24 hours of telephone inquiry and consultant access time annually that is included in the standard subscription; arrangements can be made for additional time if required.)
On-site Presentation	A tailored presentation of research findings and recommendations (travel expenses additional).
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients. Two seats are reserved per client; additional seats are available at two-thirds off the list price.

OPTIONAL DELIVERABLES

In addition to the standard deliverables described above, INPUT also offers the following optional services and information:

- An on-site review of a client's operations
- Detailed survey data in machine-readable format for client analysis

PRICING

The initial price for subscription to the standard program is $19,950 for a twelve-month service. Arrangements can be made for subscriptions for additional sites within an organization.

Effective Applications Development Program—1992 is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Tel. (415) 961-3300,
The Atrium at Glenpointe, 400 Frank W. Burr Blvd., Teaneck, NJ 07666; Tel. (201) 801-0050,
or 1953 Gallows Road, Suite 560, Vienna, VA 22182; Tel. (703) 847-6870.

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Connecticut clients: Please add 8% sales tax on total amount.
Travel expenses for on-site presentations are additional and will be billed separately.

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Dear «GREET»,

Software Re-engineering in Europe

INPUT's new report on software re-engineering is available now, and can help you plan your strategy in this new, emerging market.

Among the questions addressed in the report are:

- **How rapidly will the use of methodologies and CASE tools spread?**
- **How are users intending to measure any gains achieved by using CASE tools?**
- **How much is currently being invested in CASE tools, and how is this likely to grow in the future?**
- **How much demand is there for training?**
- **How do users select the right vendor and tools for the job?**
- **What are the main implications for organisational structure in re-engineering existing applications?**
- **How do software engineers view client-server architectures and object oriented software?**

The report that will be of particular value both to software and services vendors, and to IS departments with heavy applications maintenance workloads. Based on in-depth user interviews France, Germany and the U.K., (the largest markets for CASE tools) the report analyses users' attitudes to re-engineering and assesses how far they are using methodologies and CASE tools in their application development. The report also provides a market forecast for CASE tools and methodologies, vital information for developing your business plan.

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INPUT's report provides essential information on users' plans for future application development. If you would like to see the table of contents of the report, please call me. To order the report, please complete and return the enclosed form.

Yours sincerely

Carol Nice
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CASE is already reducing maintenance costs for over 40% of its users ...

This finding, and many more, are detailed in INPUT's study:

Software Re-engineering in Europe

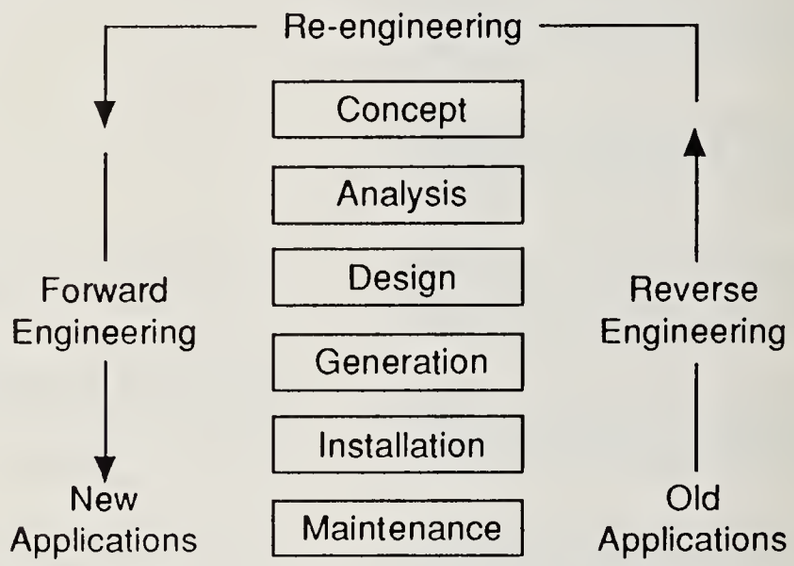
Tap the opportunity represented by your clients' maintenance workload ...

To profit from this opportunity, you need to know the answers to.....

- How quickly is the use of CASE tools and methodologies spreading?
- How do users measure the effectiveness of CASE tools?
- How much money are users investing in CASE tools?
- When will re-engineering become common practice?
- How do users view client/server architectures and object-oriented software?

INPUT's report* Software Re-engineering in Europe *has the answers to these, and more, questions.

The Software Life Cycle



INPUT's model of the software life cycle clearly shows the stages that a software project goes through. INPUT examines how vendors can help users to reverse engineer or re-engineer their applications.

Software and services companies have traditionally concentrated on providing products for *new* applications development. However, many of their clients are concentrating on maintaining *existing* applications—this takes up around 65% of the IS workload.

INPUT can help you take advantage of the opportunity to provide CASE tools and methodologies to help your clients re-engineer their existing software onto new platforms.

Why INPUT Is Qualified To Help You

This report is based on interviews with over 60 senior IS executives with responsibility for application development in France, Germany and the U.K. (the largest markets for CASE tools), and interviews with leading CASE and systems vendors. This enabled INPUT to produce an objective, unbiased view of how the market for software re-engineering is developing.

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The Benefits of this Report

- Find out how to unlock this potentially lucrative market by identifying:
  - The size of the market for CASE tools in Europe
  - Users' plans for using CASE tools over the next three years
  - The payback users expect to gain from CASE
  - How CASE is impacting users' in-house software maintenance expenditure
  - How users select a CASE product

The More You Know About Users' Needs, The Better You Can Satisfy Them

Maximise your company's success by reading INPUT's comprehensive review of this emerging market. Re-engineering software applications has enormous potential, and can help you keep your clients loyal to your products and services.

Use this report to gain a clear understanding of users' reasons for buying and using CASE tools for re-engineering software applications. The more you know about the way users view your products and services, the better you will be able to satisfy their needs.

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Since 1974, INPUT has compiled the most extensive research base on the worldwide information services market and its key segments, providing detailed market forecasts, vertical industry sector analysis and forecasts and analysis of vendor strategies and products. INPUT delivers specific expertise in the fast changing areas of outsourcing, systems integration, EDI/electronic commerce, software development/CASE, and the impact of downsizing.

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Dear «GREET»,

Multi-Vendor Maintenance Opportunities

INPUT will shortly release a new report examining the opportunities in Europe for multi-vendor maintenance, which is essential reading for both equipment vendors and independent maintenance organisations. The report can help you plan your future strategy in this market, as it:

- Describes the market driving forces
- Identifies new service opportunities
- Forecasts the size of the market in Europe, for each of 16 country markets, and for Eastern Europe
- Identifies and ranks the leading vendors in Europe and in each country market.

Maintenance prices are being forced downwards as users find that it is becoming cheaper to buy a new system than to maintain the old. This means that vendors that are heavily reliant on maintenance revenues are facing the challenge of how to respond to this trend if they are to survive and remain profitable. INPUT's report helps by identifying the new opportunities that INPUT believes maintenance organisations should address, for example, providing desktop services and network maintenance.

The report provides an estimate of the market penetration by independent vendors in Europe, and also how the multi-vendor market is split between the different levels of platform:

- Mainframes
- Mid-range systems
- Workstations
- PCs

This information enables vendors to see where the best opportunities lie for the skill that they have, and to identify the proportion of the market taken up by independent vendors, and the likely directions that their strategic initiatives will take. As computer systems become more open, equipment suppliers are finding they are now not

necessarily the natural choice of supplier for maintenance. Independent vendors have more opportunities as the market becomes more open. INPUT's report examines the opportunities and threats that vendors are facing as a result of the increasing move towards open systems.

The report recommends strategies for succeeding in this open, but increasingly complex and competitive market. To order your copy of the report, or to request further information, please complete and return the enclosed form.

Yours sincerely

Carol Nice
Senior Marketing Analyst
INPUT - Europe

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European Multi-Vendor Maintenance Markets 1992-1997

Summary Table of Contents

I Introduction

- A Objectives
- B Scope
- C Methodology
- D Report Structure

II Executive Overview

- A Open Systems Opens the Door
- B Desktop Services a Major Outsourcing Opportunity
- C Multi-Vendor Maintenance Market Redefined
- D Maintenance Markets in Europe, 1992-1997
- E Multi-Vendor Maintenance Markets
- F Winners and Losers

III Multi-Vendor Maintenance Market Analysis

- A Definition of Multi-Vendor Maintenance
- B The Total Maintenance Market in Europe
- C Multi-Vendor Market Forecast by Platform
- D Multi-Vendor Market Forecast by Country

IV Multi-Vendor Maintenance as an Opportunity

- A Main-line Role vs. Specialist Role
- B Requirements for Desktop Services
- C Requirements for Open Systems

Appendices

- A Definitions and Terms
- B Economic Assumptions
- C User Questionnaire
- D Vendor Questionnaire

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